

FIG. 1

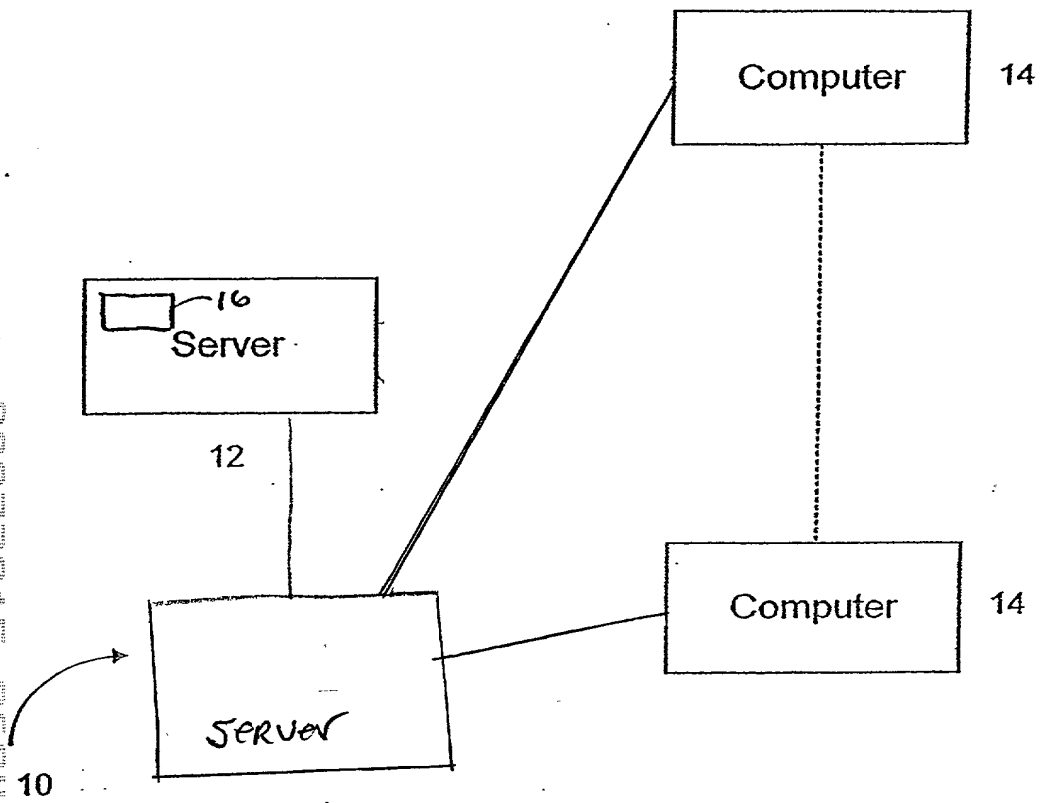


FIG. 1

Fig. 2

"Phono" 3132300 Getting into the system

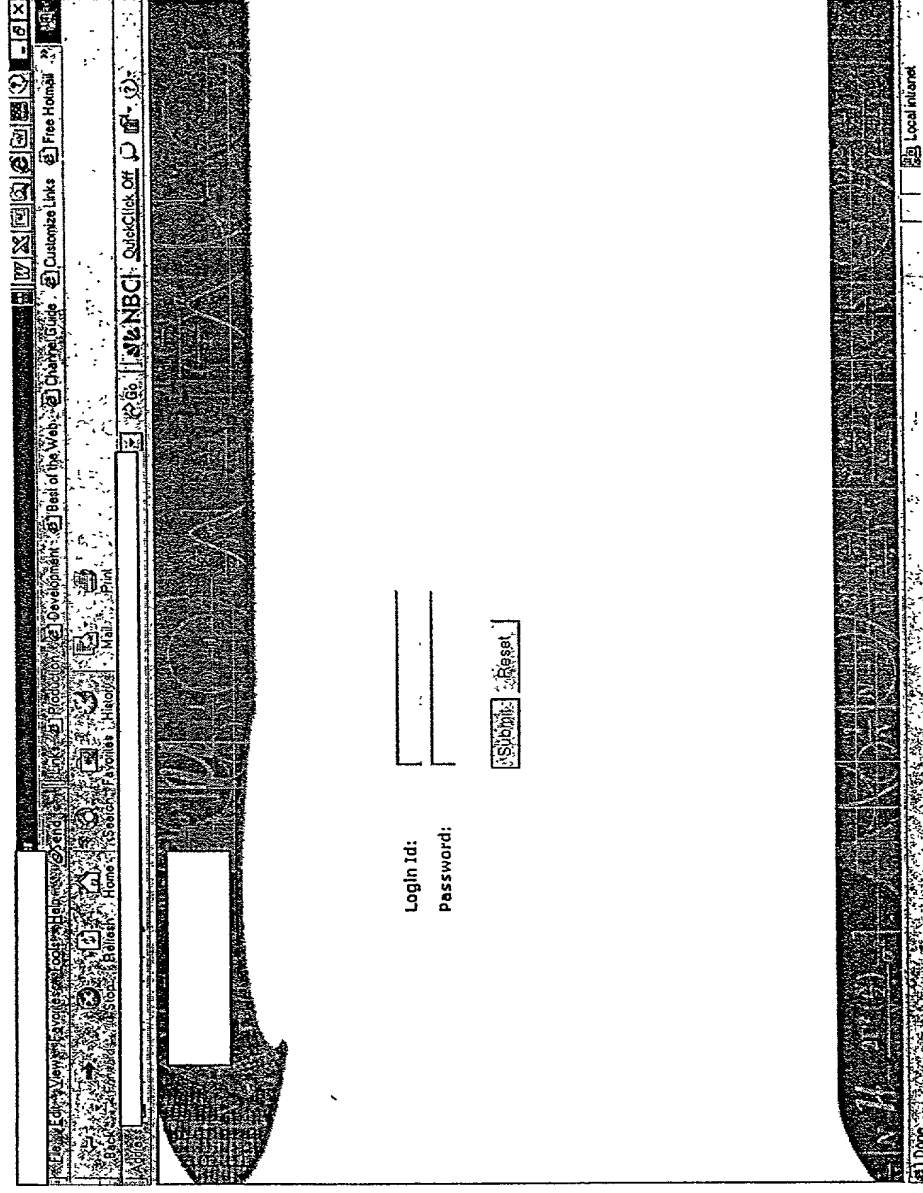
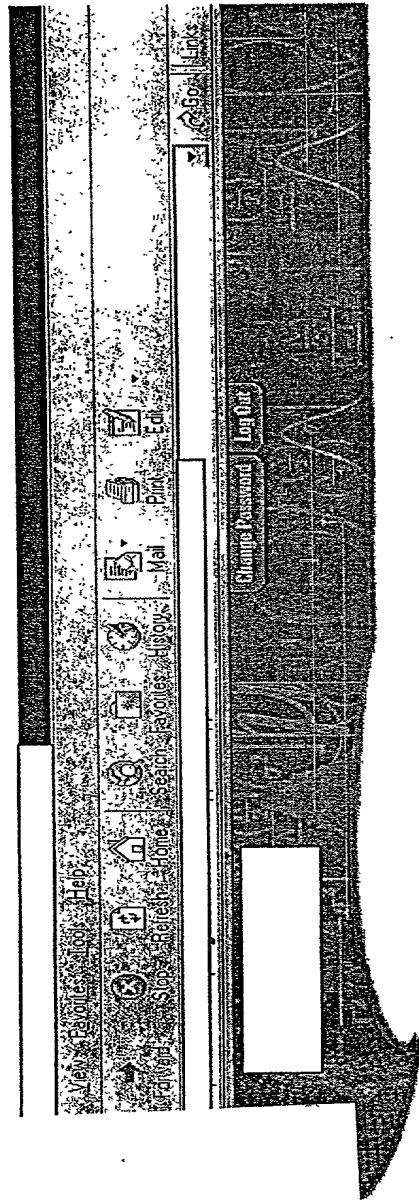


Fig. 3

Creating a Template - 1



Template definition

Template name :	Contact name :
Frequency : -Select-	Contact phone :
First Due Date :	Contact email :
	File attachment :
	Template description :

Field definitions

- User Profiles
- Templates
- Create
- Template Definitions
- Validations
- Select Box Details
- Field Categories
- Metric Targets
- Modify
- Copy template Definition
- Reporting Periods
- Entities

36

Creating a Template - 2

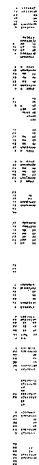


Fig. 5

Template Definitions

Field	Guide	Example
Display Type	This field tells what will show up on the form in what order.	Text: will provide an input box Select box: makes a drop down Header Text: displays a comment on the form Text Area: creates a longer comment type box
Field Name	Individual name used for the field in the database	Ques1
Field Type	Describes what the input will be for the question posed	Char: Text Input Number: Numerical Input Date: Date Input Calculated: Derived from other fields on the form.
Field Length	Only valid for text input. You can limit the length.	
Default Value	The value that will show up before there is an entry	
Metric Type	What is the class of Metrics	Number, Percentage, Reverse Percentage
Indent Level	Used for formatting. Each number is 4 characters.	
Field Label	What will display on the input form?	Enter number of days late:
Short Label	This is something that could be on a report.	Days Late
Label Style	For formatting	Normal <i>Italic</i> Bold
Help Text	This will display in the bottom white box, character space is limited to that size.	Enter the total number of complete days
Mouse Text	This allows for hundred of characters. Longer descriptions should go here	This is calculated as the day the actual delivery was made – the day that it was due.
Roll up Method	Not valid for all. If you are rolling it up, how will you do it?	Sum, Average, Max, Weighted Average
Calculation Formula	If the field is based on other fields in the form use this line to show that calculation	Field1*Field2
Category	If you want your metric grouped with another, click on your category that you have created.	<u>Spend</u> metrics
Display Metric	Yes or no. This is used to distinguish between actual tracked metrics and not.	

Validation





Adding Metric Targets

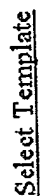


Fig. 9

Adding Metric Targets cont.

File Edit View Favorites Tools Help

Back Forward Stop Reload Home Search Favorites History Print Edit

Change Password Log Out

Metric targets entry/modification

Template name :
 Frequency : Monthly
 Report Month : Jan 2000

Field order	Field Name	Weight	Green Level	Yellow Level	Red
1	users_supported	17	12	12	=
2	number_of_calls	16565	1	1	between
4	speed_yield	10	34	34	>=
5	speed_median	12	12	12	>
6	speed_span		Select	Select	Select
7	abandoned_rate	36466	0	0	>=
8	resolved_on_first_c		Select	Select	Select
10	critical_yield	3	0	0	<

[User Profiles](#)
[Templates](#)
[Create](#)
[Template Definitions](#)
[Validations](#)
[Select Box Details](#)
[Field Categories](#)
[Metric Targets](#)
[Modify](#)
[Copy Template Definition](#)
[Reporting Periods](#)
[Entities](#)
[Reports](#)
[Metrics Entry](#)

Internet

Fig. 10

Create Field Categories

File Edit View Favorites Tools Help

Back Forward Stop Reload Home Search Favorites History Mail Print Edit

Address

Change Password Log Out

Done

Internet

➤ User Profiles

➤ Templates

➤ Create

➤ Template Definitions

➤ Validations

➤ Select Box Details

➤ Field Categories

➤ Metric Targets

➤ Modify

➤ Copy Template Definition

➤ Reporting Details

➤ Upload Help File

➤ View Attachments

➤ Entities

➤ Reports

➤ Metrics Entry

Create Field Category

Enter Category Details

Template :

Category name :

Category Description :

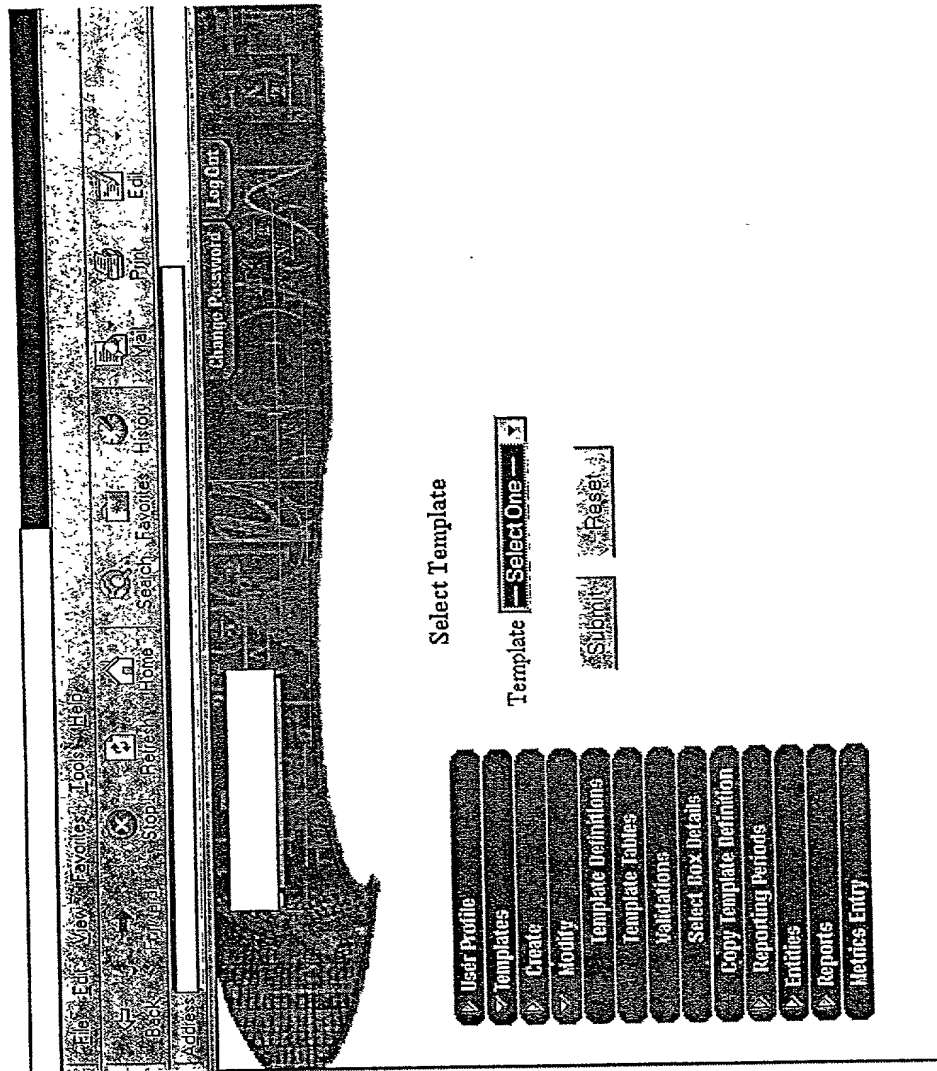
Category Order :

Continue

Reset

Fig. 11

Modify Template



Modify Template Table



Fig. 13

Modifying The Template

User Profiles

Templates

Create

Modify

Template Definitions

Template Tables

Field Order

Validations

Select Box Details

Field Categories

Field Attributes

Entity Targets

Copy Template Definition

Reporting Periods

Upload Help File

View Attachments

Entities

Reports

Business Entry

Field Order: 4

Display Type: Select Box

Field Type: CHAR (25)

Indent Level: 1

Short Label: Test Short 4

Help Text: Help 4

Field Name: FieldName4

Field Length: 25

Field Label: Select Box Test 4

Label Style: Normal

Mouse Text: Mouse Text 4

For field type CHAR: # characters

For field type NUMBER: # decimals

Save & Exit

Changing Field Order

Fig. 14

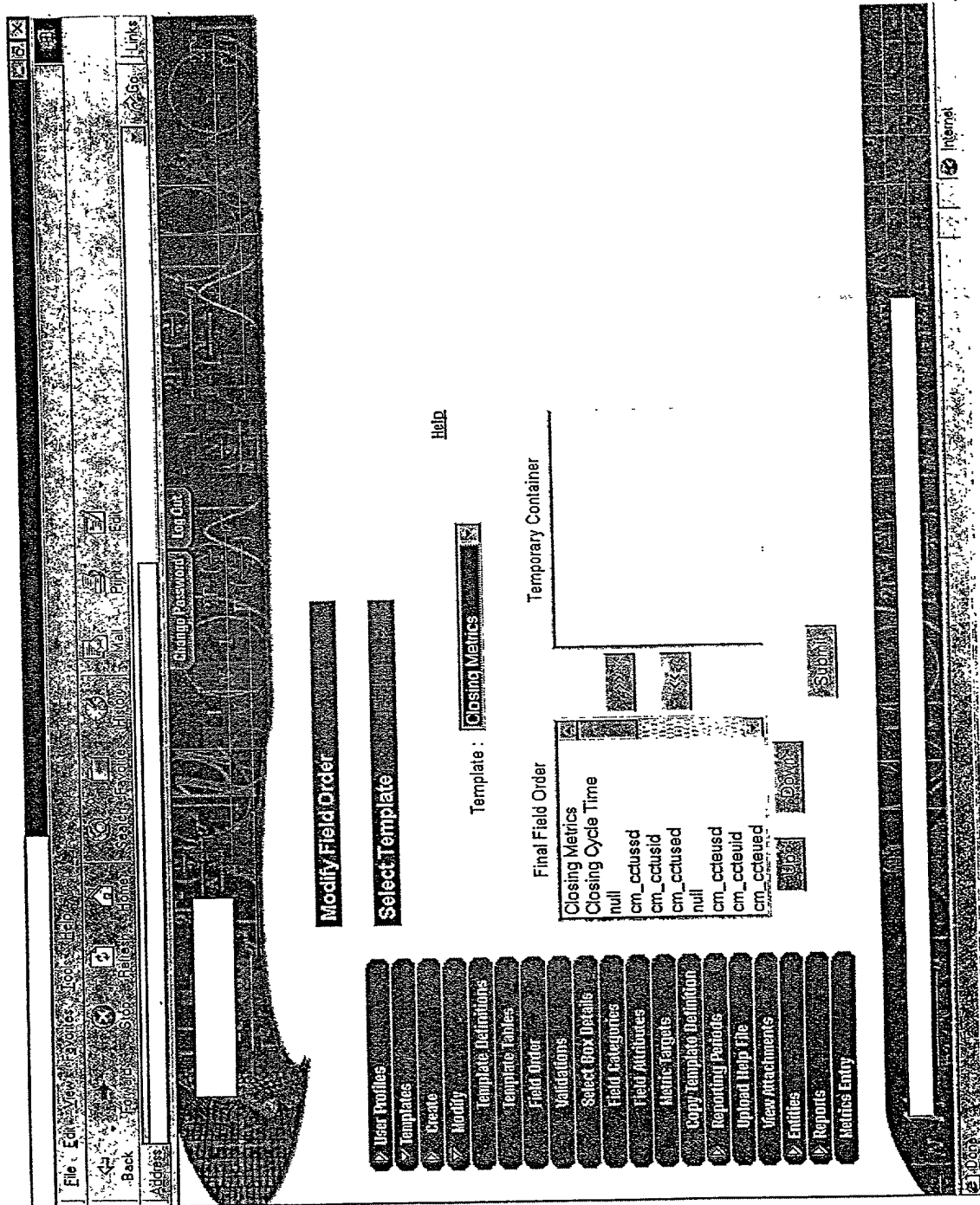


Fig. 15

FORNOST" 31222300

Modify Validations

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Collections History View Edit

Address

Change Password Log Out

Template : HD METRICS

Fields : normal_yield

Select a blank in the condition dropdown to remove a validation.

Condition

between 0:1

Message

Please type a percentage

Proceed

Yes

Condition

between 0:1

Message

Please type a percentage

Proceed

Yes

User Profiles

Templates

Create

Modify

Template Definitions

Template Tables

Field Under

Validations

Select Box Details

Field Attributes

Field Attributes

Metric Targets

Copy Template Definition

Reporting Periods

Upload Help File

View Attachments

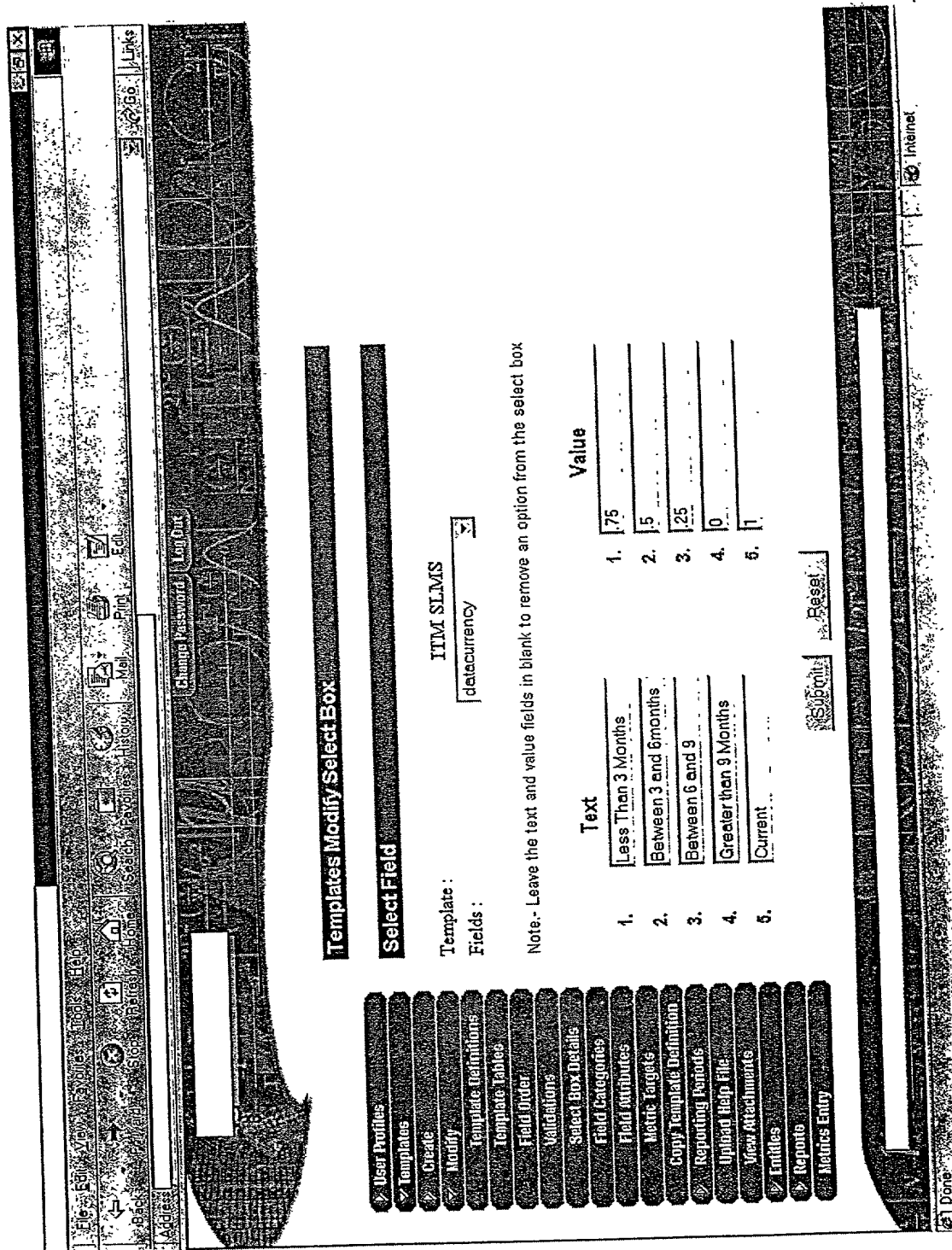
Entities

Reports

Metrics Entry

Modify Select Box

Fig. 16



Modify Field Categories



Modify Field Attributes

Fig. 18

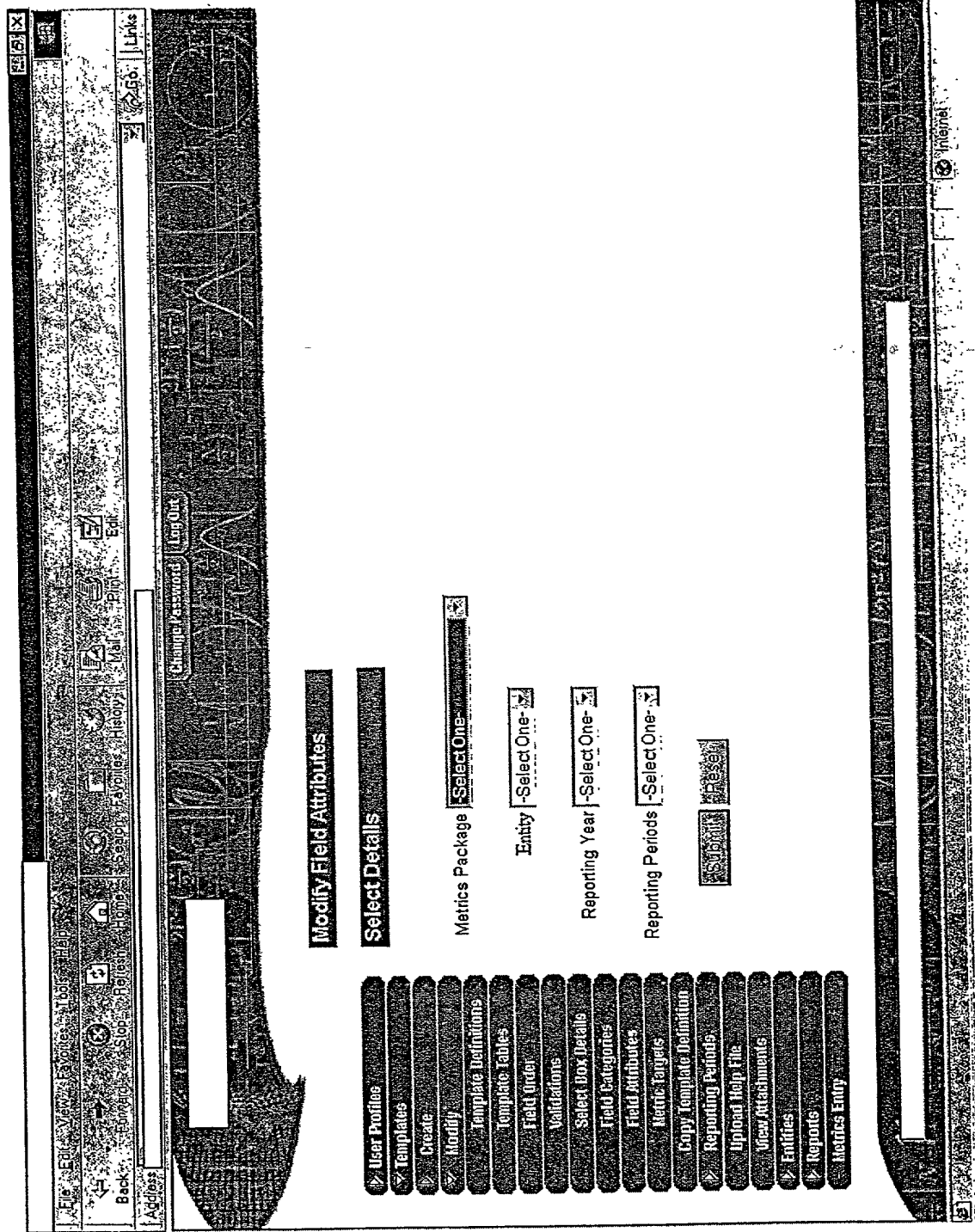


Fig. 19



Fig. 20

Copy Template Definition

File Edit View Favorites Tools Help

Back Forward Stop Reload Home Search Mail Print Edit

Address

Go Links

Change Password Log Out

Copy Template Definition

User Profiles

Templates

Create

Modify

Copy Template Definition

Reporting Periods

Upload Help File

View Attachments

Entities

Reports

Metrics Entry

Template name :

Frequency :

Starting period :

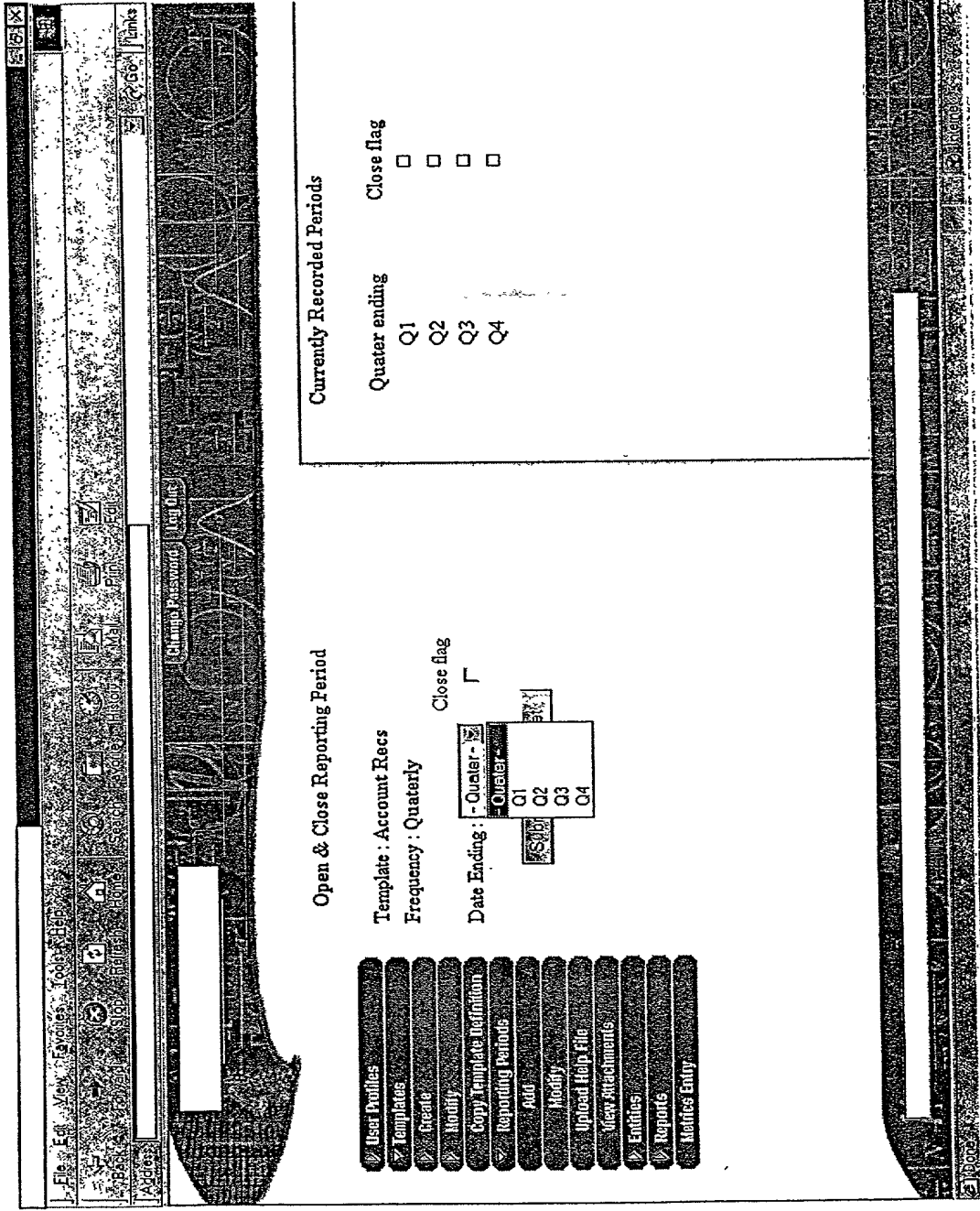
Copy from :

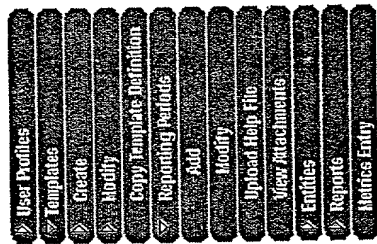
Copy Template Definition

Internet

Reporting Periods

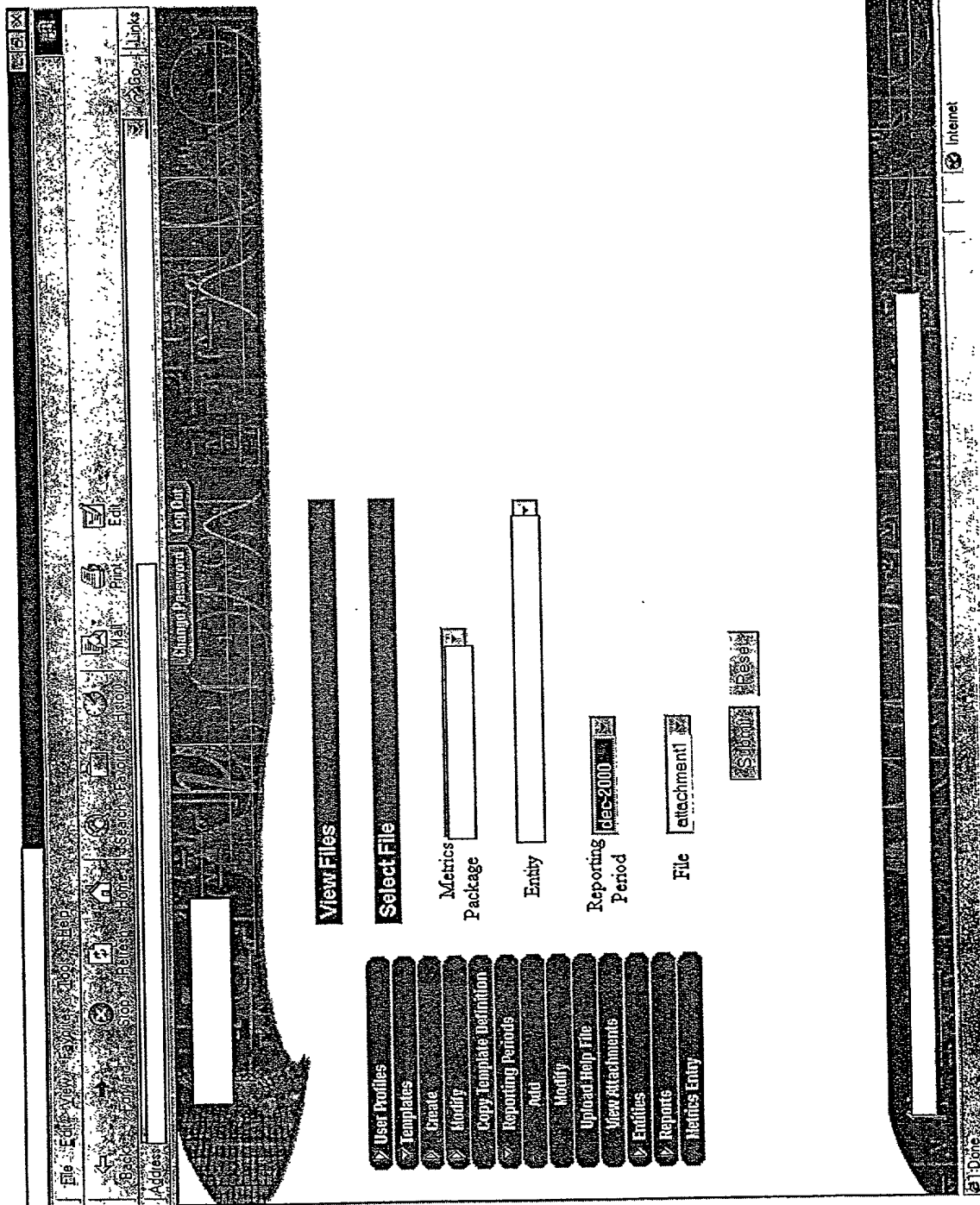
Fig. 21





View Uploaded Files

Fig. 23



Adding Entities to your Template

Fig. 24

Example:

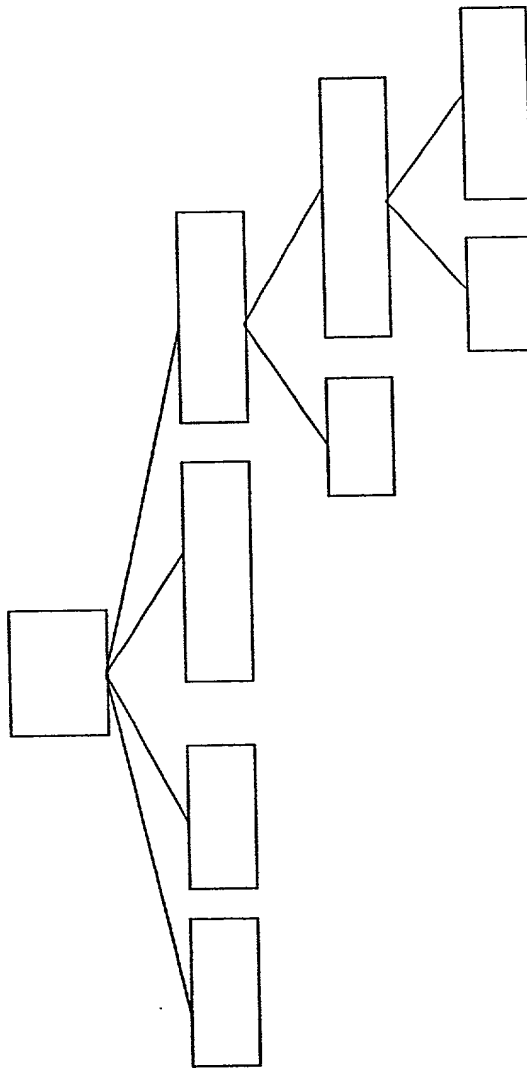


Fig. 25

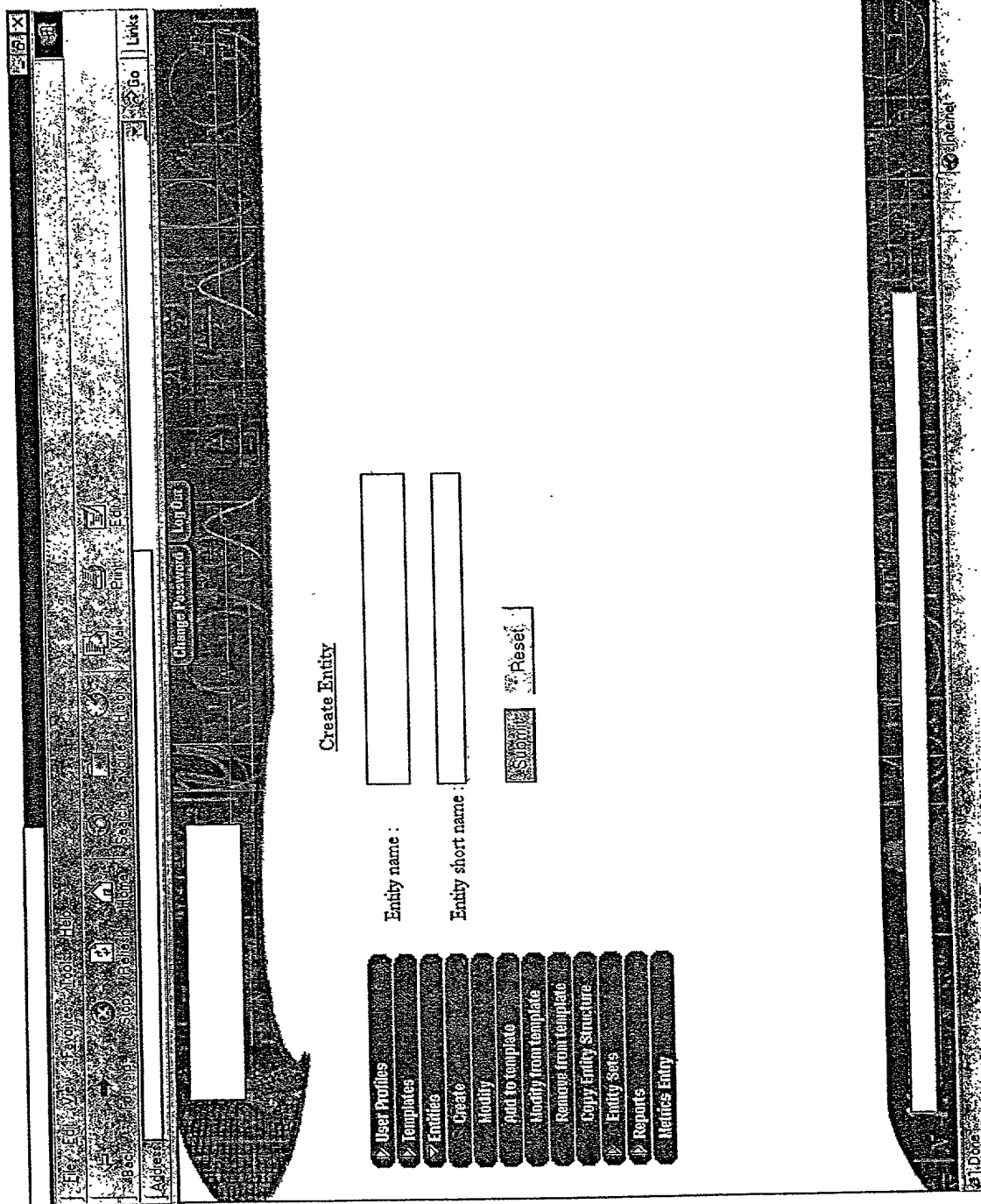


Fig. 26

FIGURE 26

Adding Entities to the Template

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Home Mail Print Edit

Address

Change Password Log Out

User Profile

Templates

Entities

Create

Modify

Add to template

Modify from template

Remove from template

Reports

Metrics Entry

Template :

Entity name :

Display Name :

Parent entity :
Select One

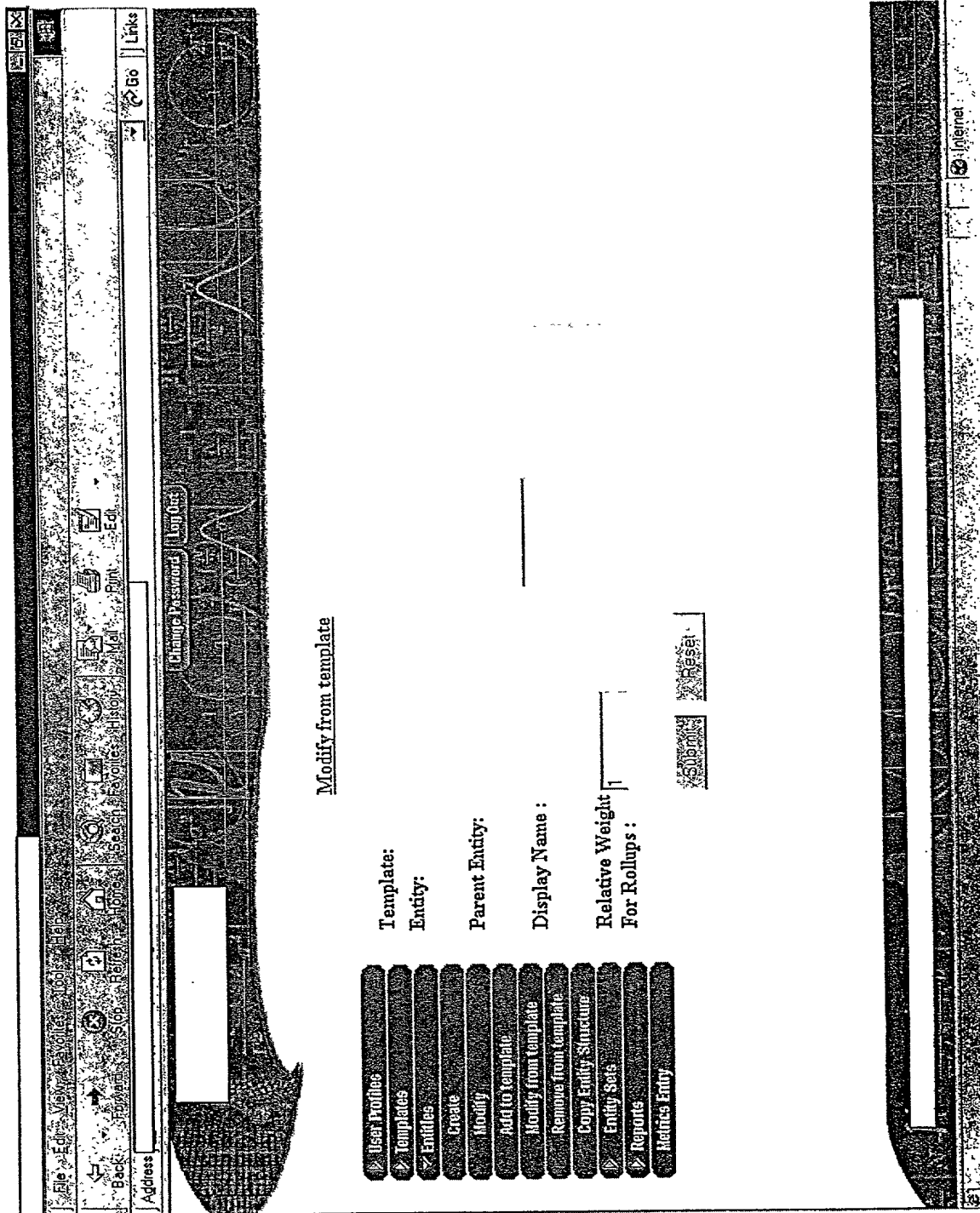
Relative Weight
For Rollups :

Submit

Reset

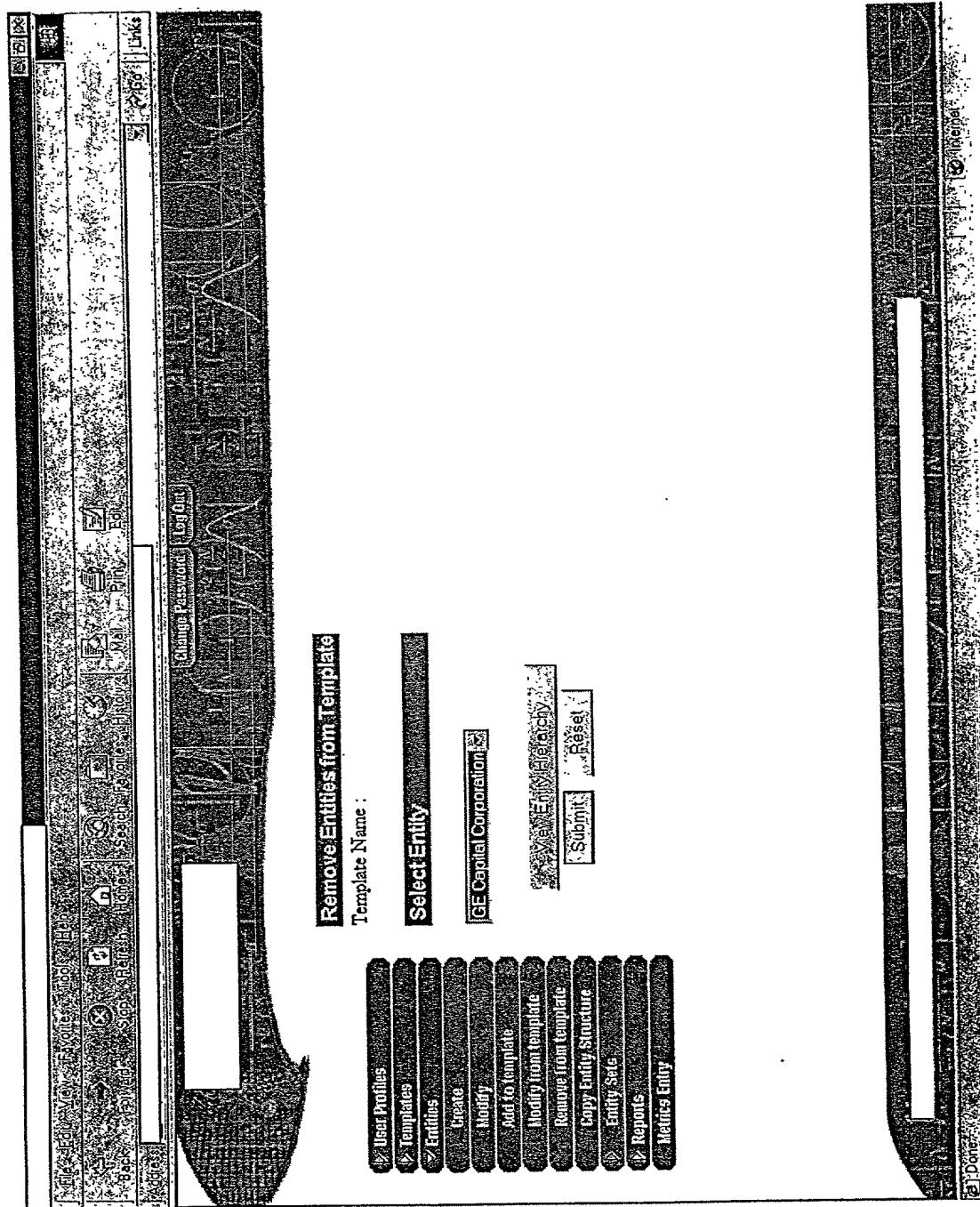
Fig. 27

Modify from Template



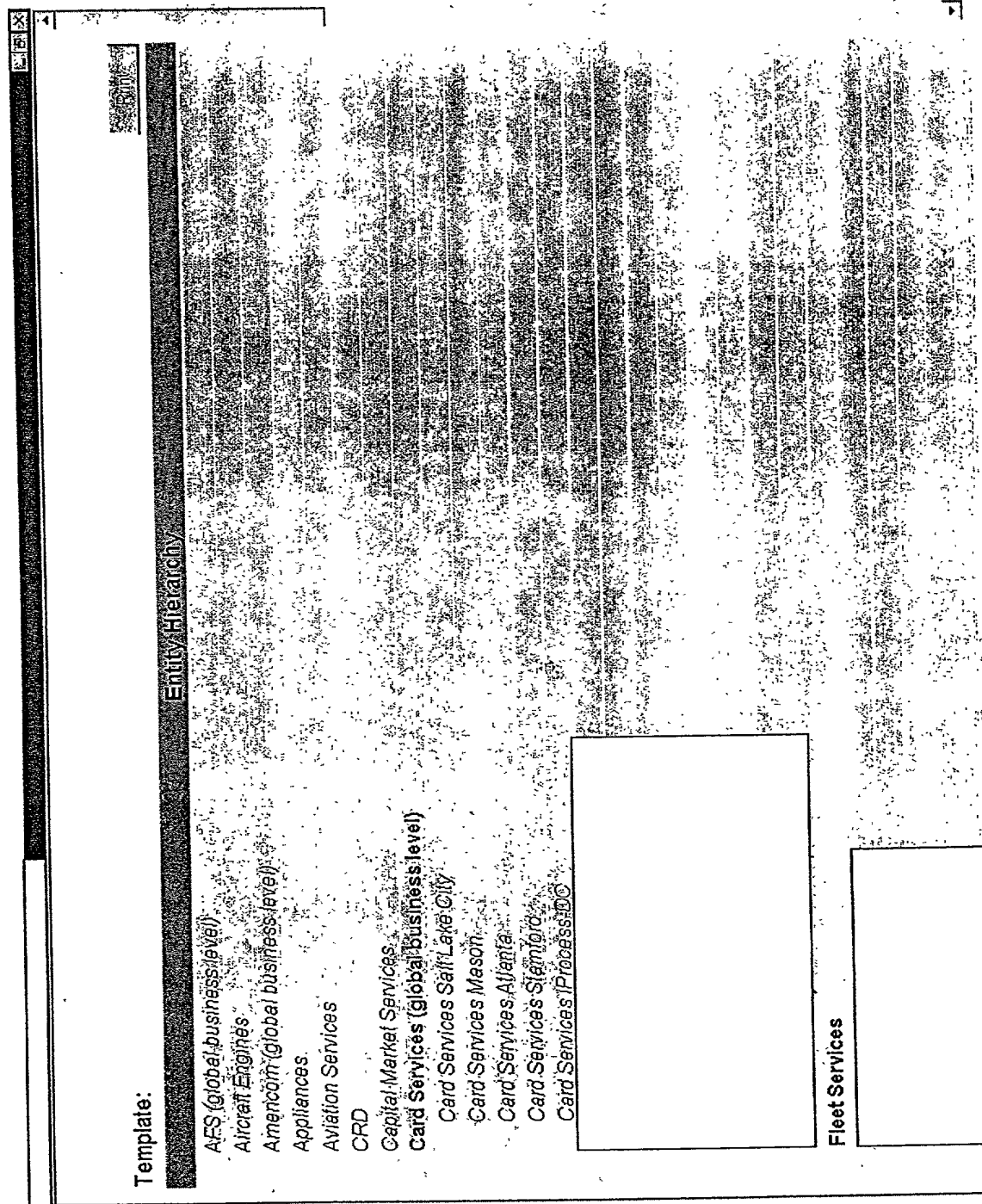
Remove from Template

Fig. 28



View Entity Hierarchy

Fig. 29



Copy Entity Structure

Fig. 30

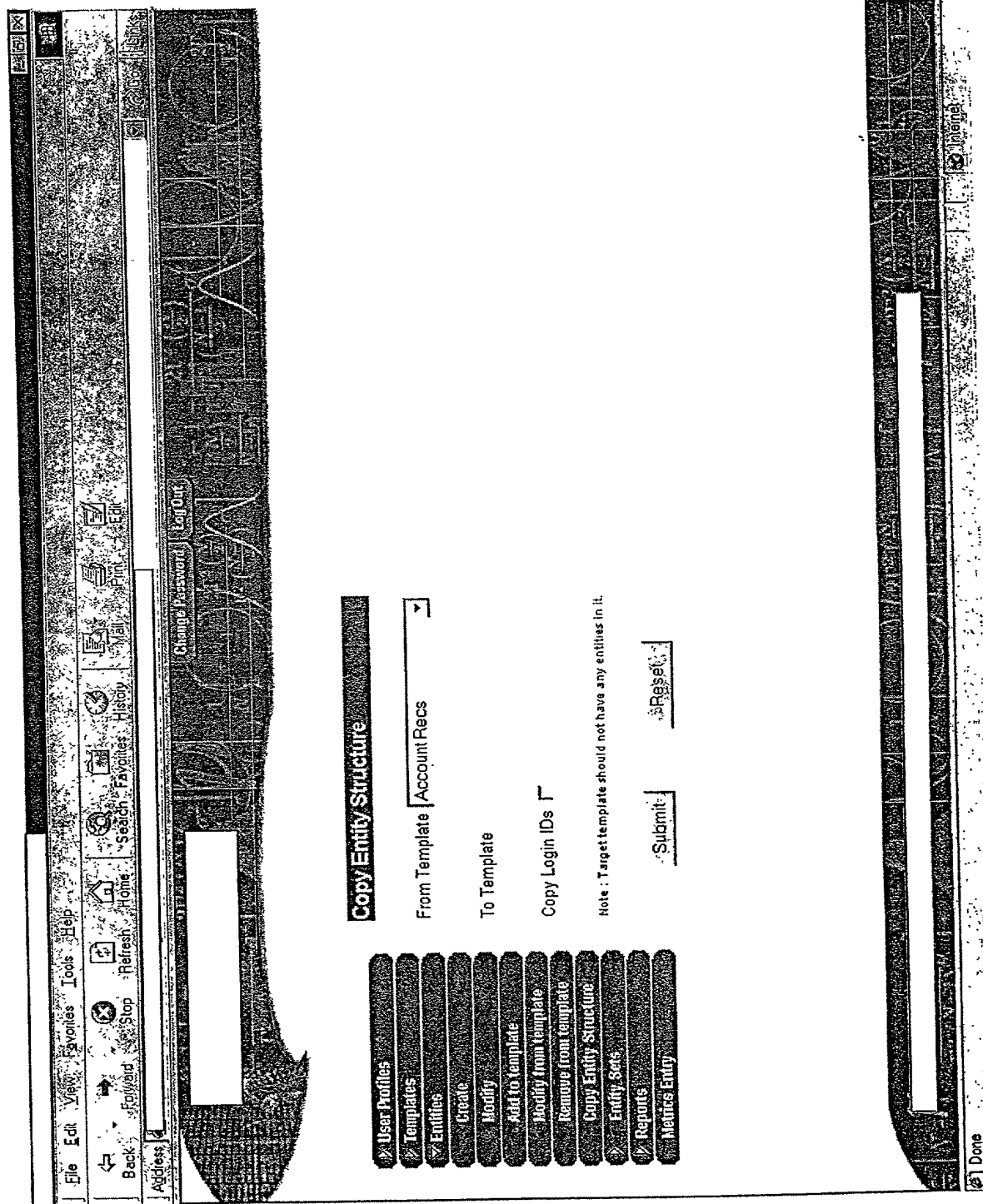


Fig. 31

Creating Users

File Edit View Options Window Help

Back Forward Stop Reload Search Favorites Home Print

Address

http://www.pearsoncmg.com

Change Password Log Out

PEARSON CMG

User Profile
Create user
Admin user
Grant access to templates
Grant access to entities
Reset Password
Templates
Entities
Reports
Help/Exit

Login id:

First name:

Last name:

Telephone:

E-mail:

if it is the same as the login id, leave it in blank

User Type:

Select One

Notes:

Fig. 32

User Types

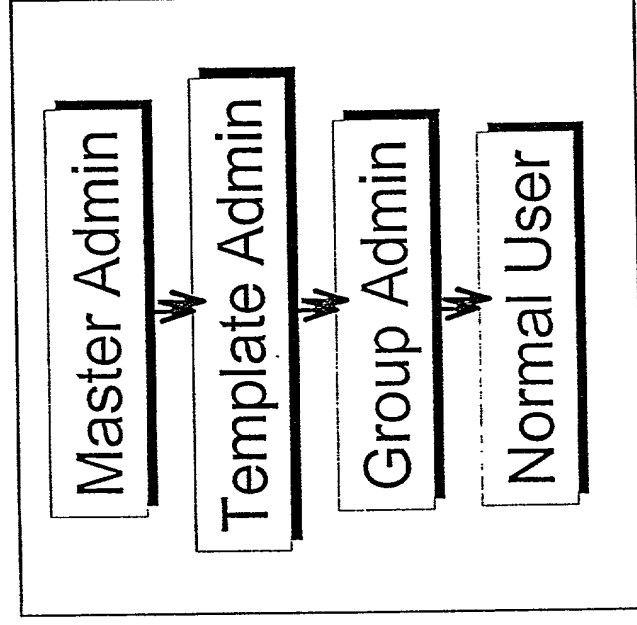
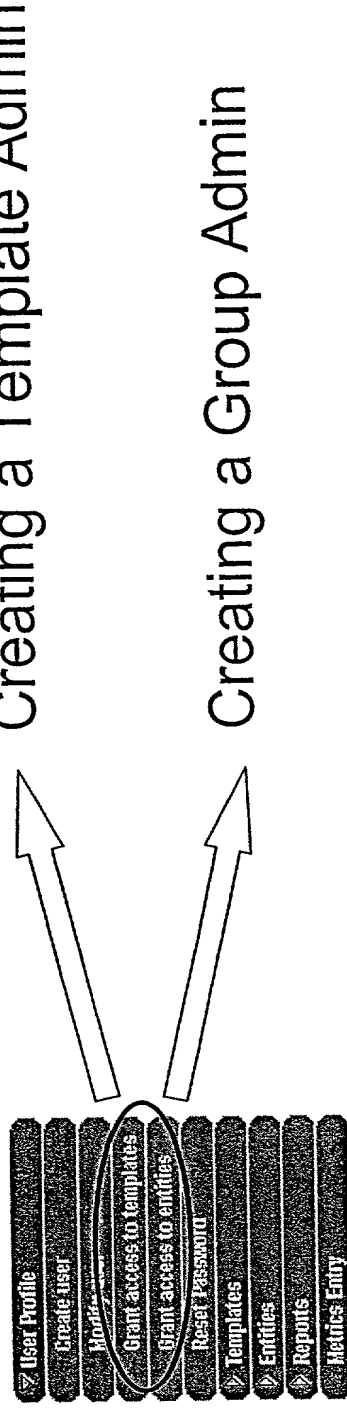


Fig. 33

Granting User Access



Template Admin:

- Select the Template for which you want to grant Access
- Select the user ID for which you want to grant Access
- Select the level of access they should have
- Submit

Group Admin:

- Select the Template that contains the group for which you want to grant Access
- Select the user ID for which you want to grant Access
- Select the Group that they represent
- Submit
- Select view only or modify privileges

Fig. 34

Metrics Entry

Change Password

Log Out

Metrics Entry

User Profile

Create user

Modify user

Grant access to templates

Grant access to entities

Reset Password

Templates

Entities

Logout

Metrics Entry

Select Metrics Package

Metrics Package

Reporting Entity

Entry for Date Ending

Select One

Select One

Select One

Submit

Reset

Dashboards

Fig. 35

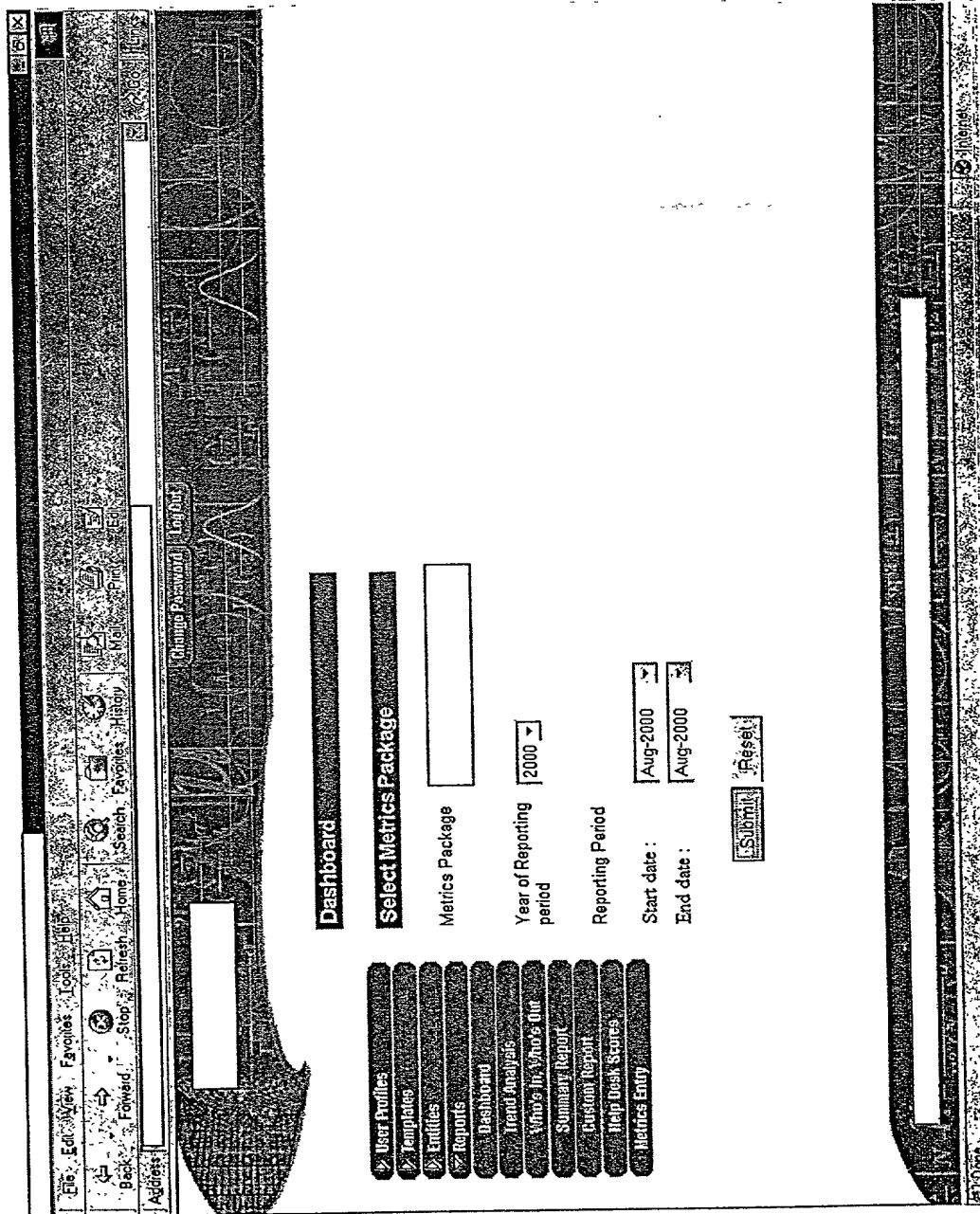


Fig. 36

Dashboard

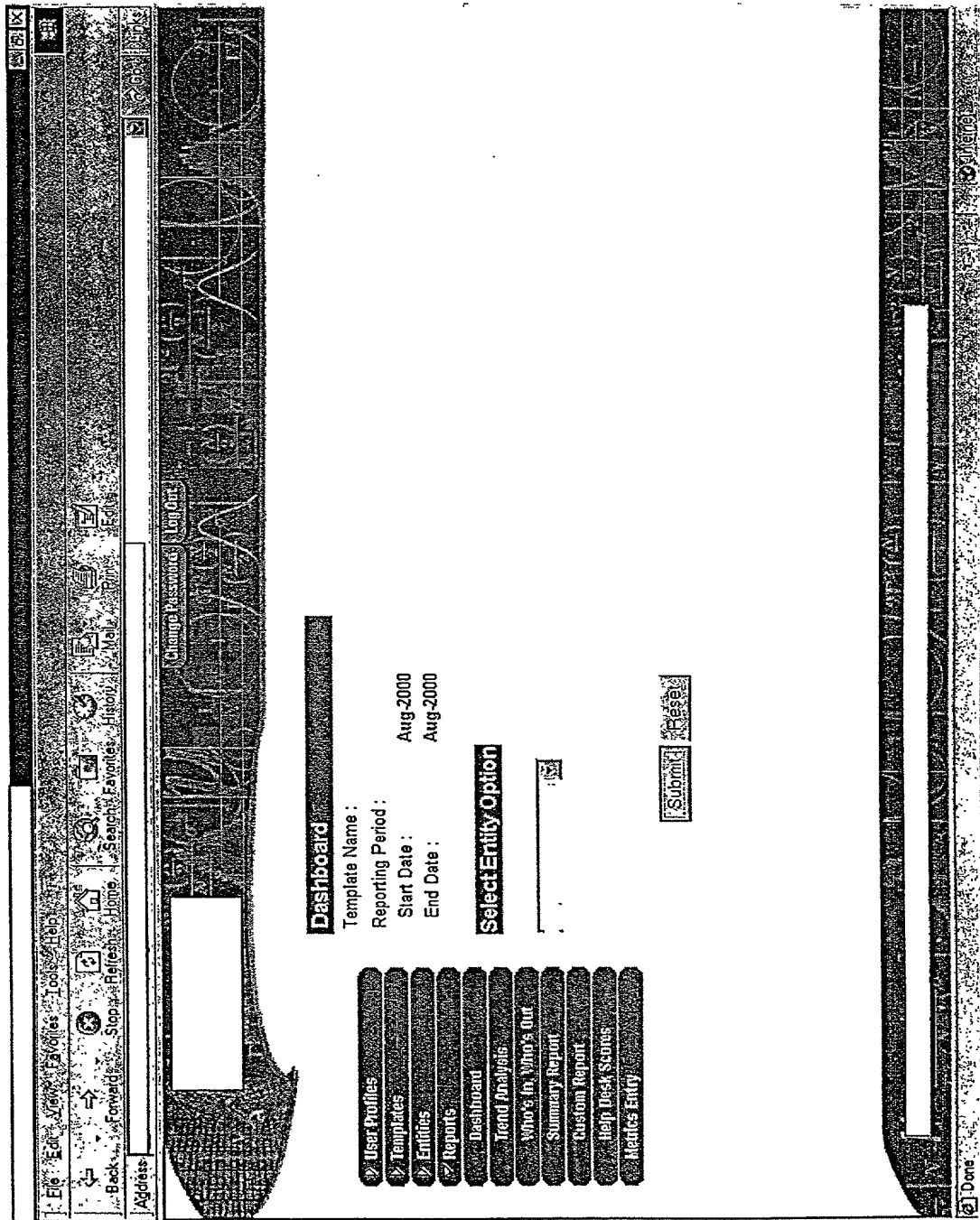
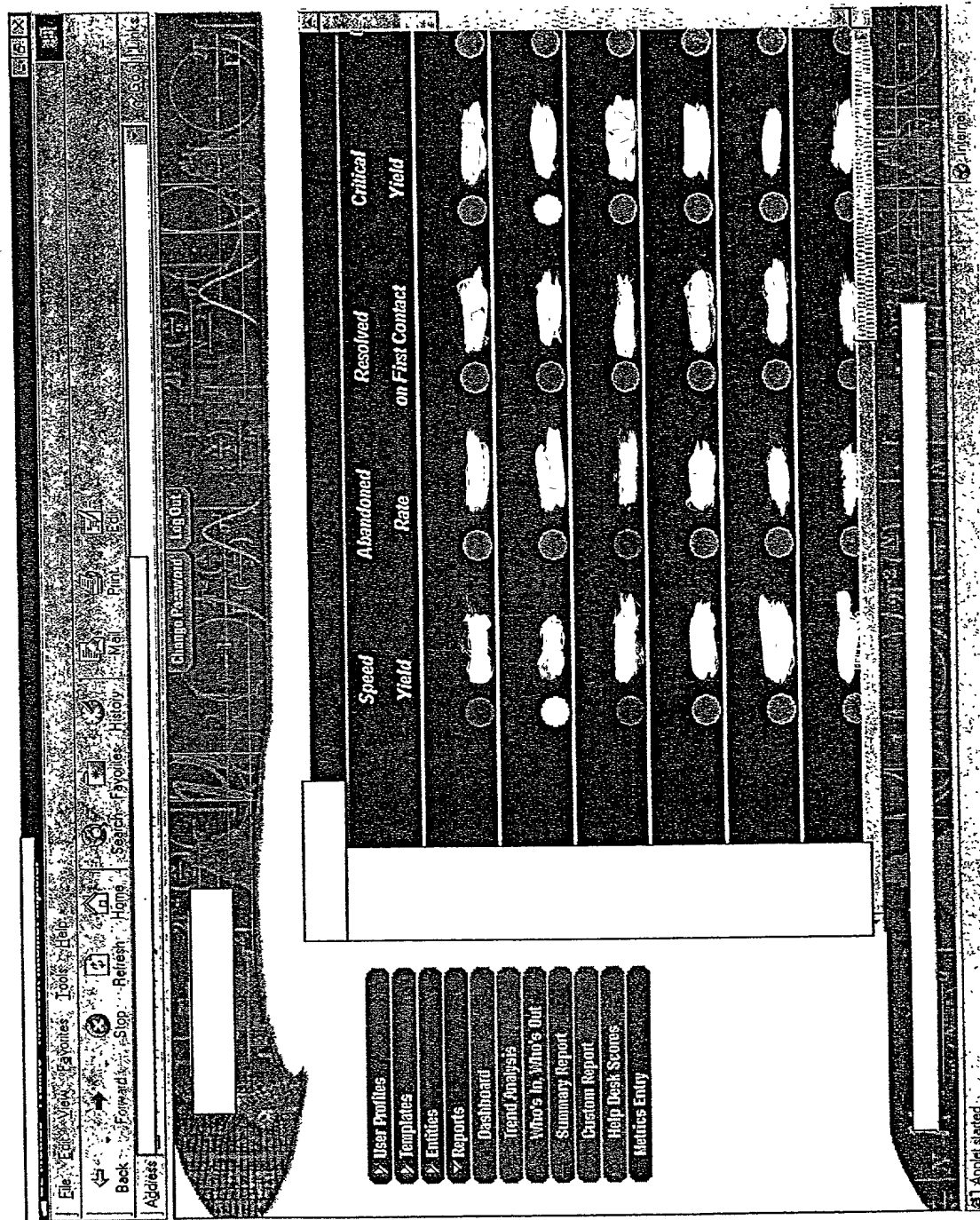


Fig. 37



Trend Analysis

Fig. 38

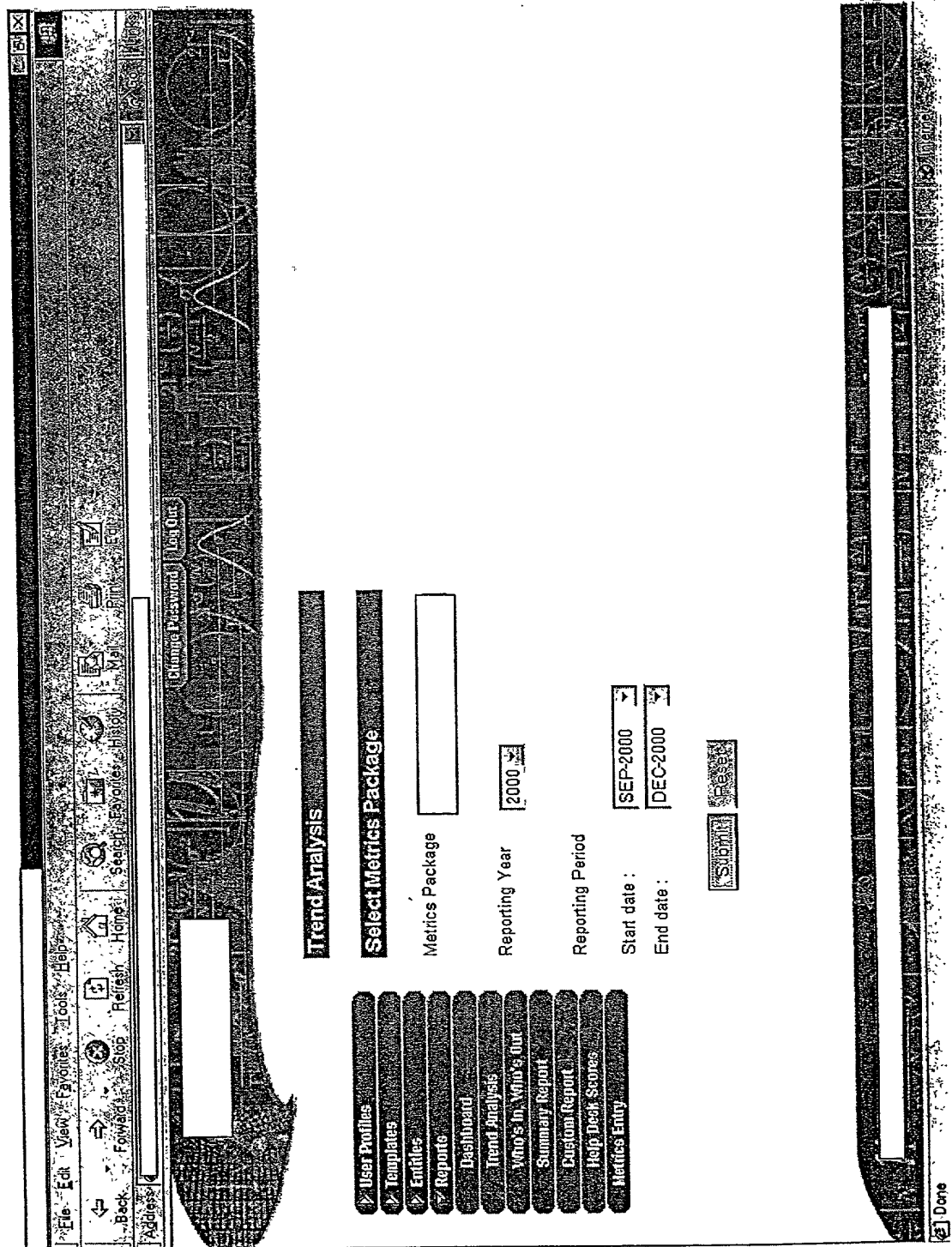


Fig. 39

Trend Analysis (part 1)

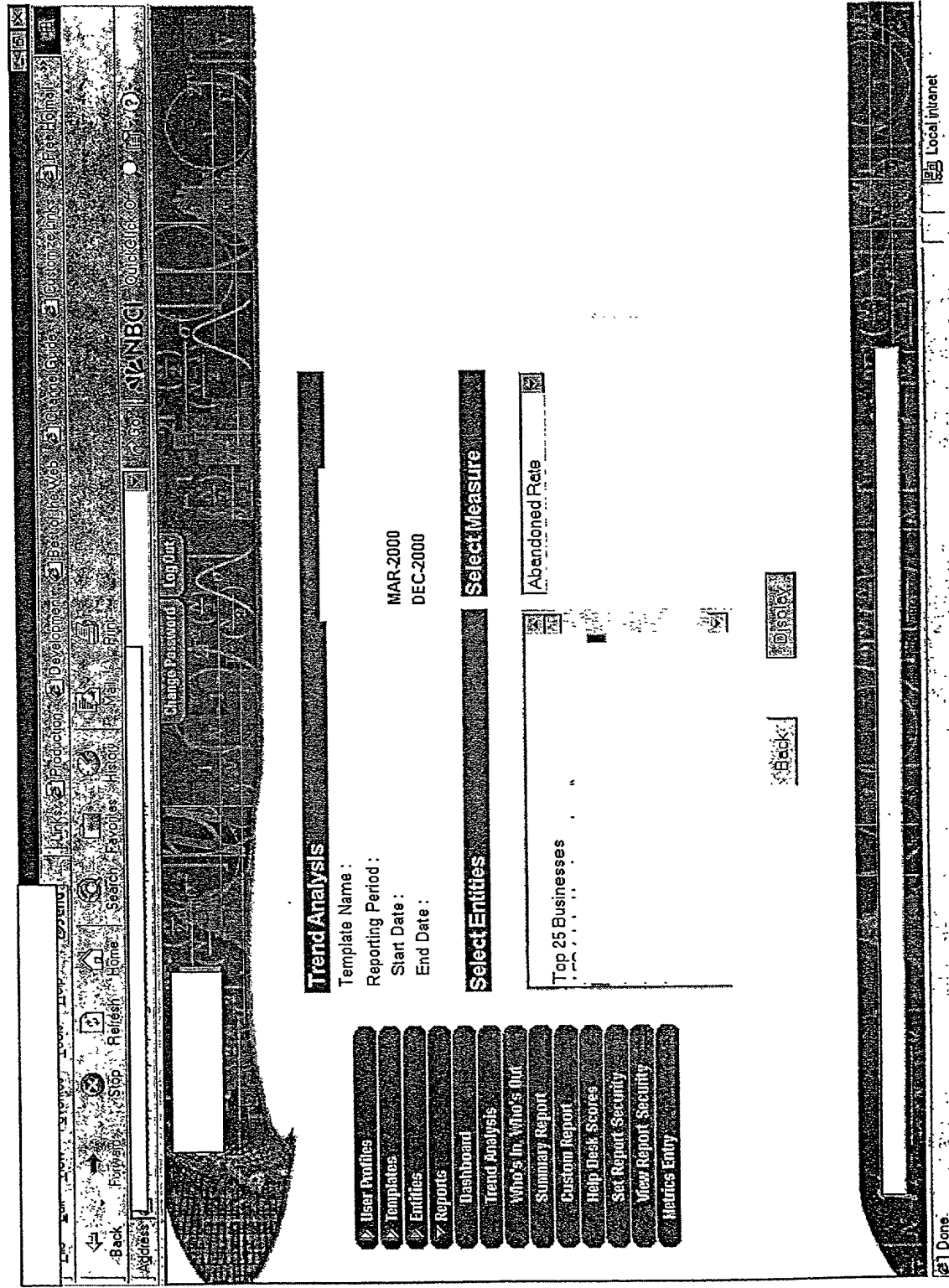
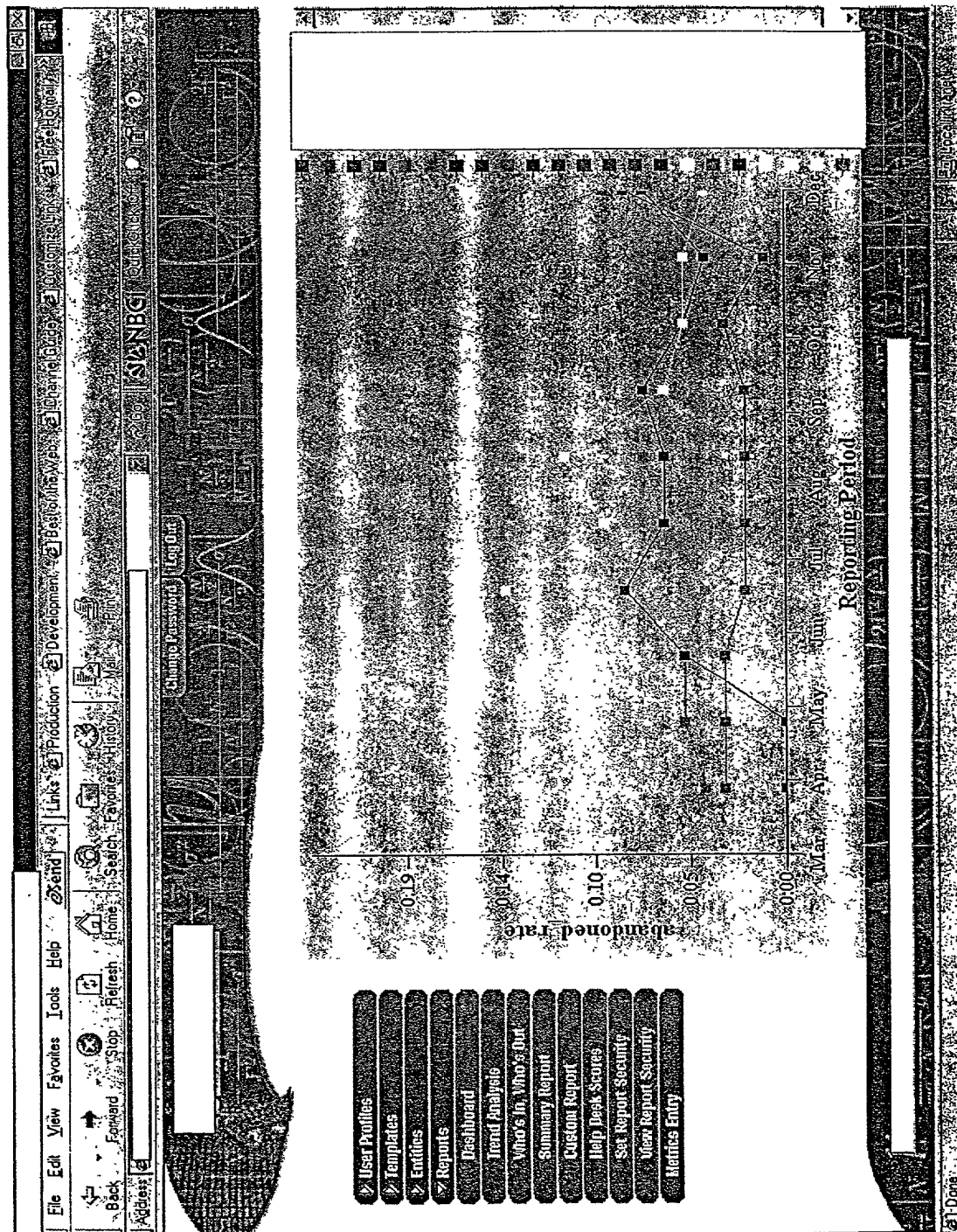


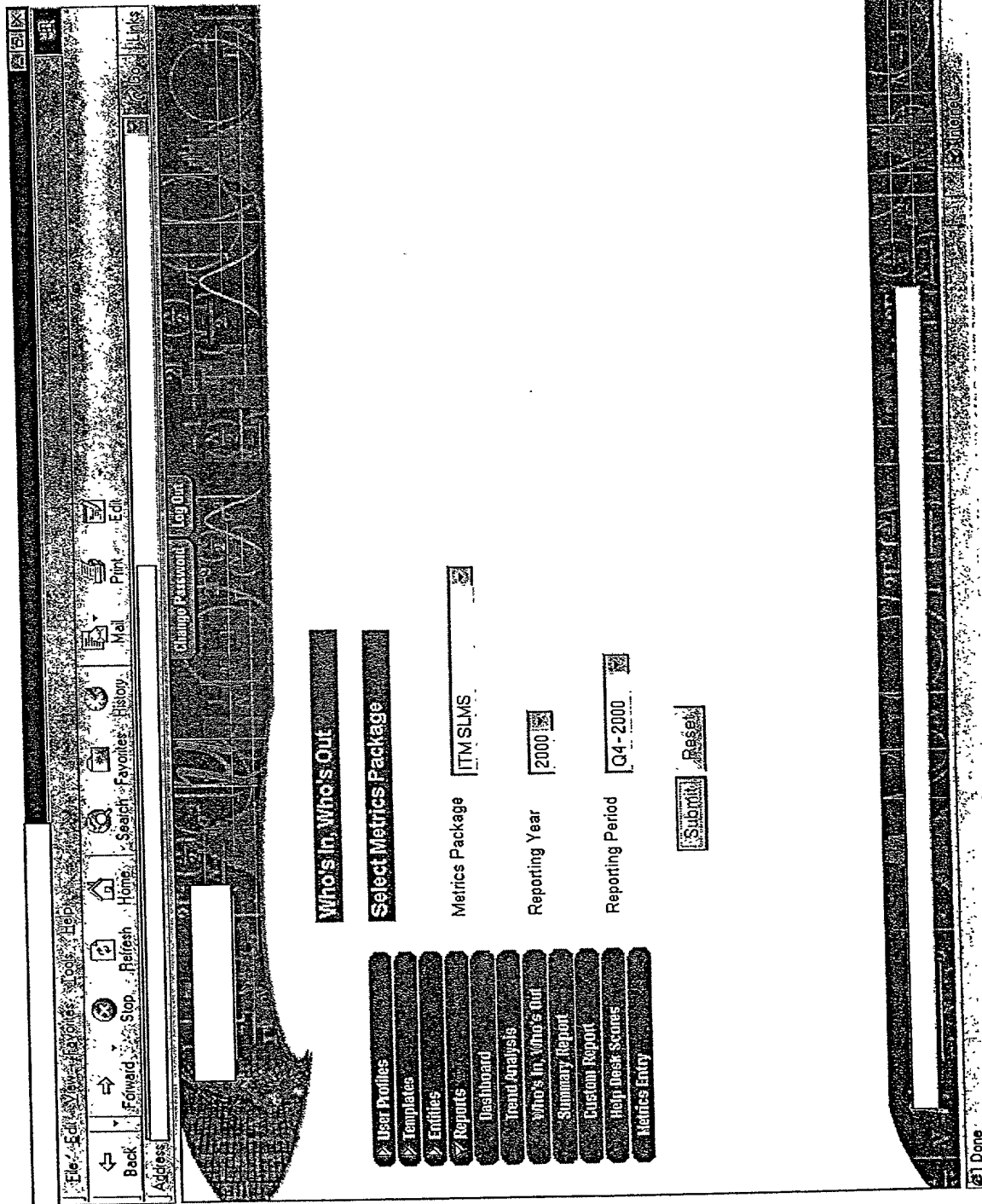
Fig. 40

Trend Analysis (part 2)



Who's in Who's out?

Fig. 41



Who's In, Who's Out

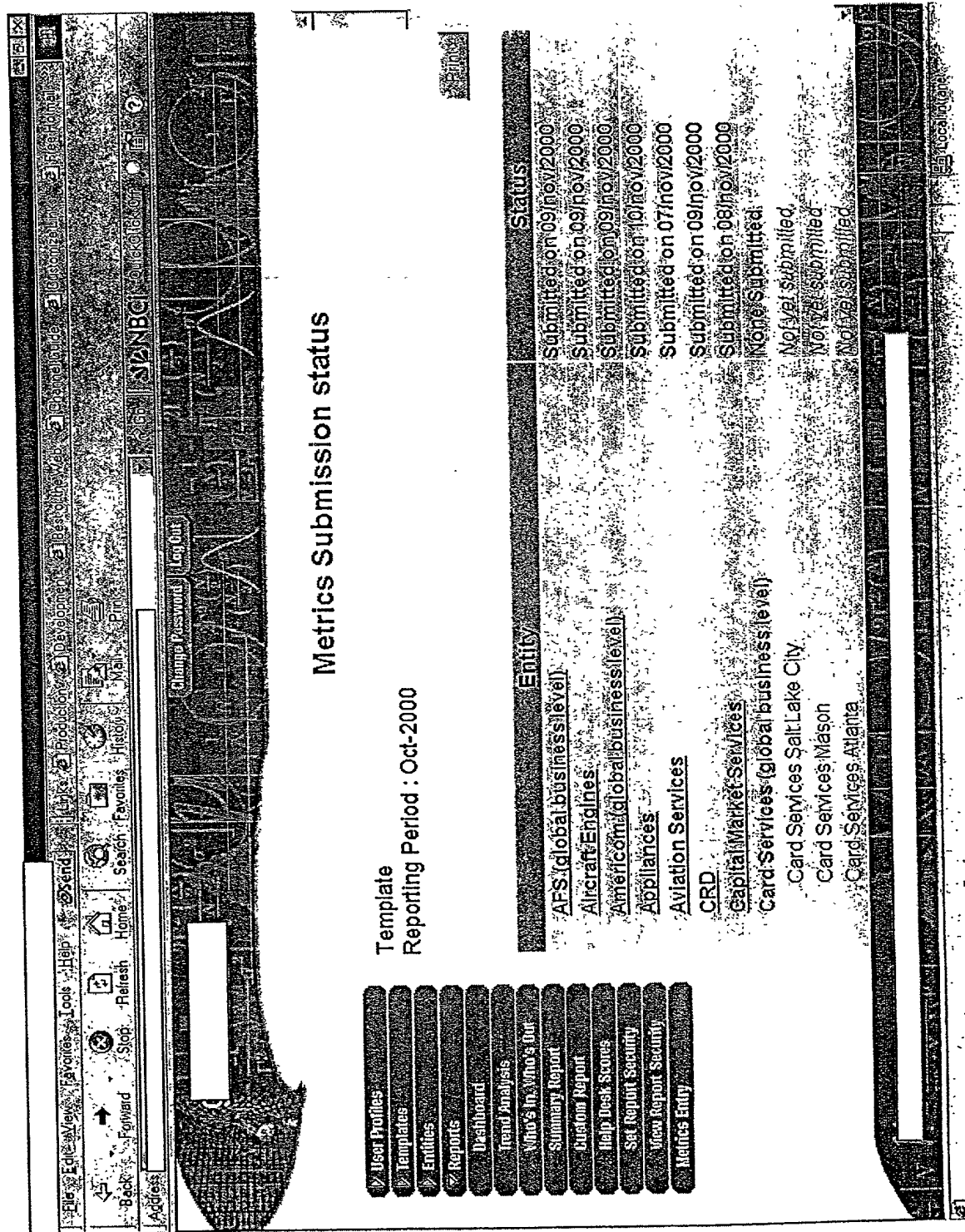


Fig. 43

Summary Report

File Edit View Favorites Tools Help

Back Forward Stop Reload Home

Address

Change Password Log Out

2000-01-01 12:00:00

2000-01-01 12:00:00

User Profiles

Templates

Entities

Reports

Dashboard

Trend Analysis

Who's In, Who's Out

Summary Report

Custom Report

Help Desk Score

Metrics Entry

Summary Report

Select Metrics Package

Metrics Package

Reporting Year

Reporting Period

Custom Report

2000

Q4 - 2000

Custom Report

Fig. 44

Summary Report

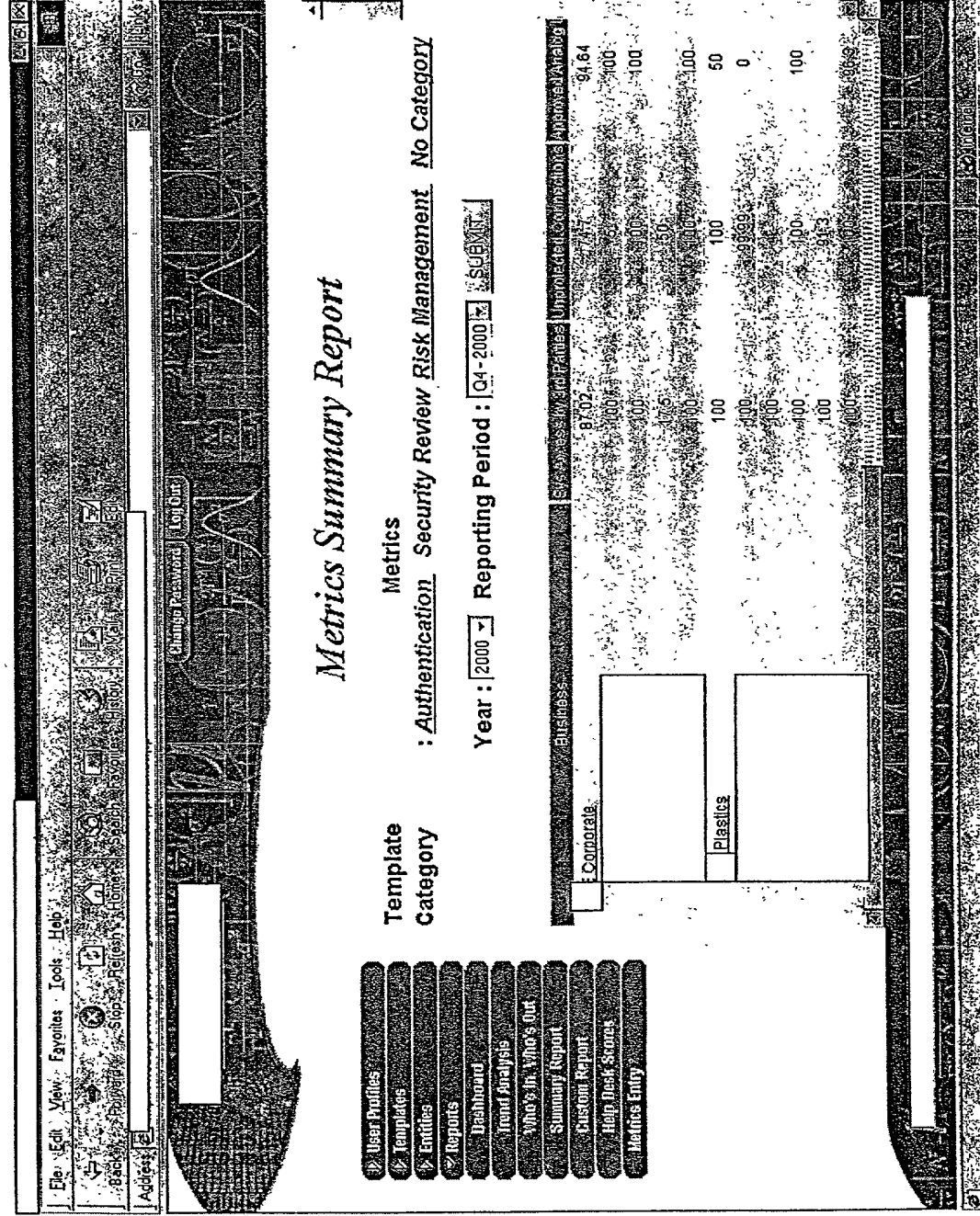


Fig. 45

Custom Report

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Engine History Mail Print Edit

Address

Change Password Log Out

User Profiles

Templates

Entities

Reports

Dashboard

Trend Analysis

Who's In, Who's Out

Summary Report

Custom Report

Help Desk Stories

Denice Entry

Custom Report

Select Metrics Package

Metrics Package

Reporting Year

2000

Reporting Period

Start date : Q4-2000

End date : Q4-2000

Submit Reset

Done

Fig. 46

Custom Report

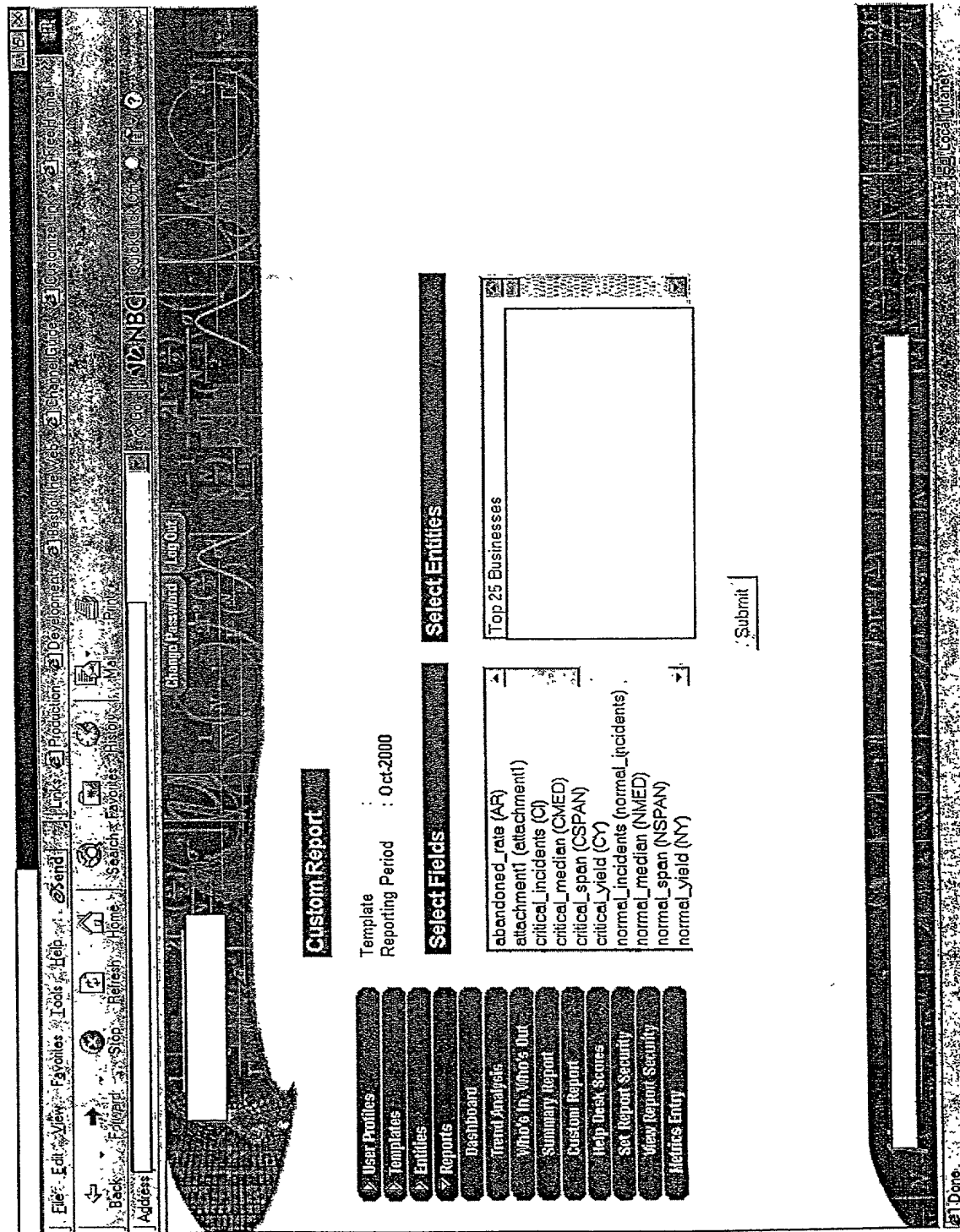


Fig. 47

Custom Report

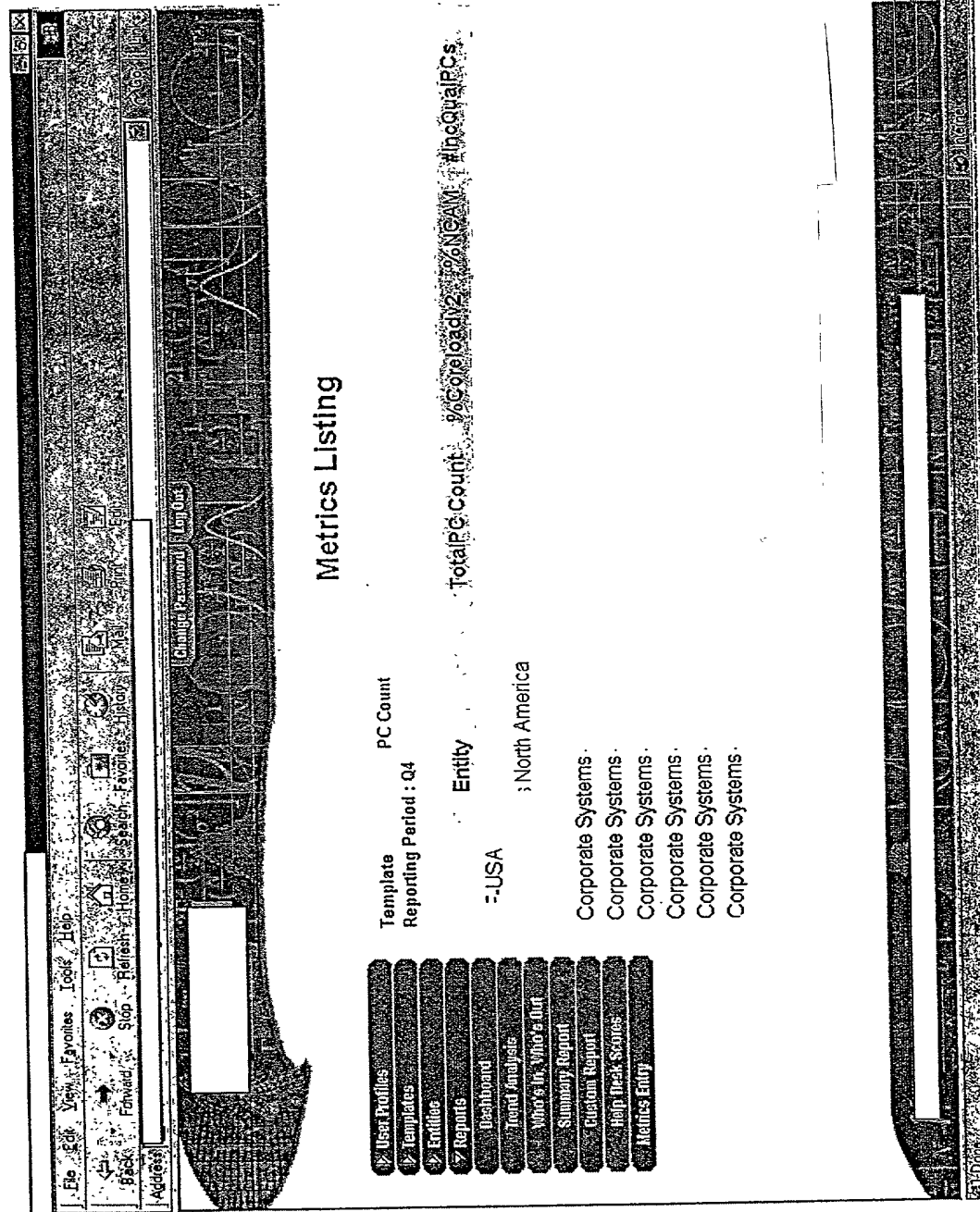


Fig. 48

Help Desk Scores

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit

Address: [Redacted]

Change Password Log Out

Help Desk Scores

User Profiles

Templates

Entities

☒ Reports

Dashboard

Trend Analysis

Who's In Who's Out

Summary Report

Custom Report

Help Desk Scores

Metrics Entry

Select Metrics Package

Metrics Package

Reporting Year

Reporting Period

Start date :

End date :

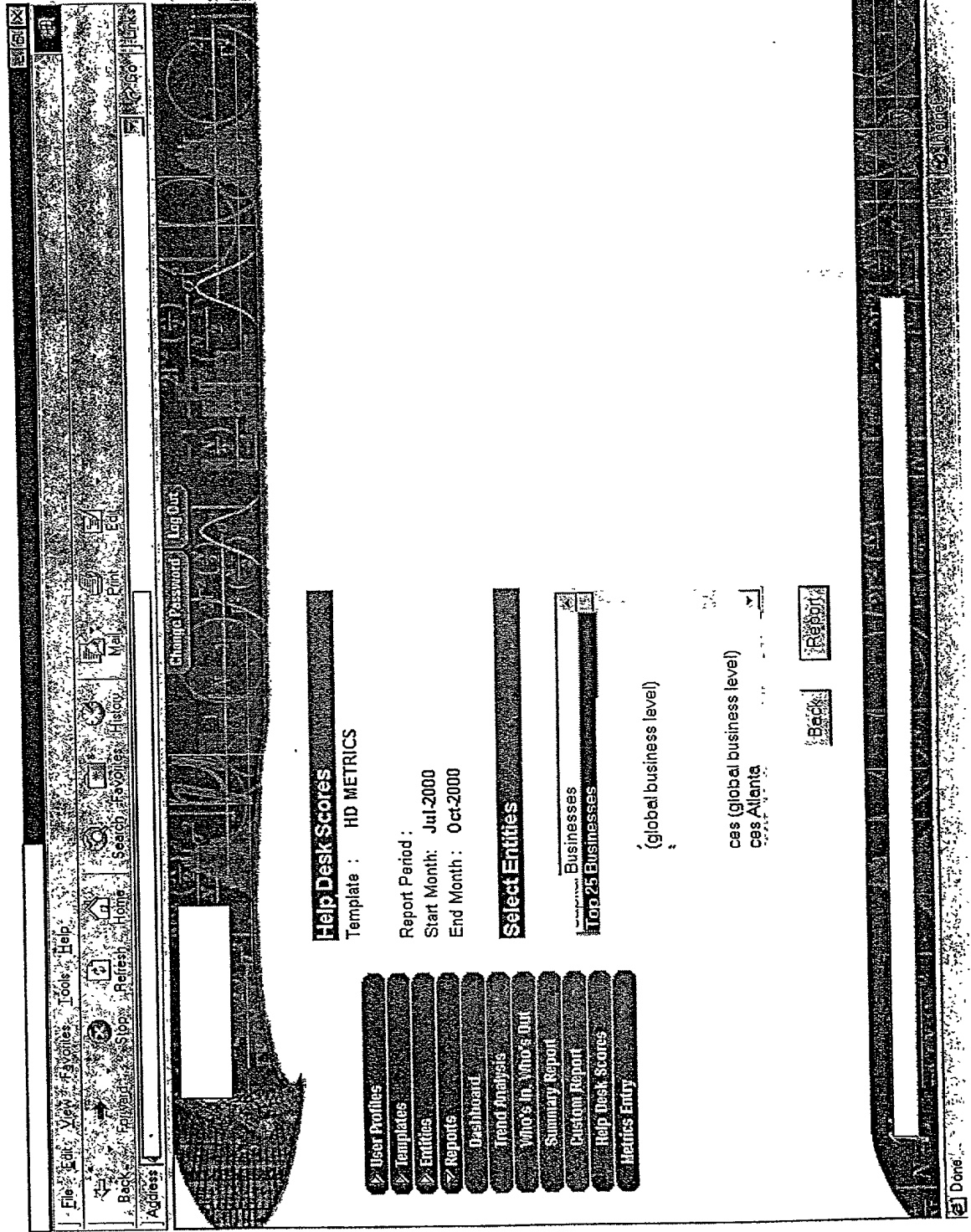
Submit

Reset

Done

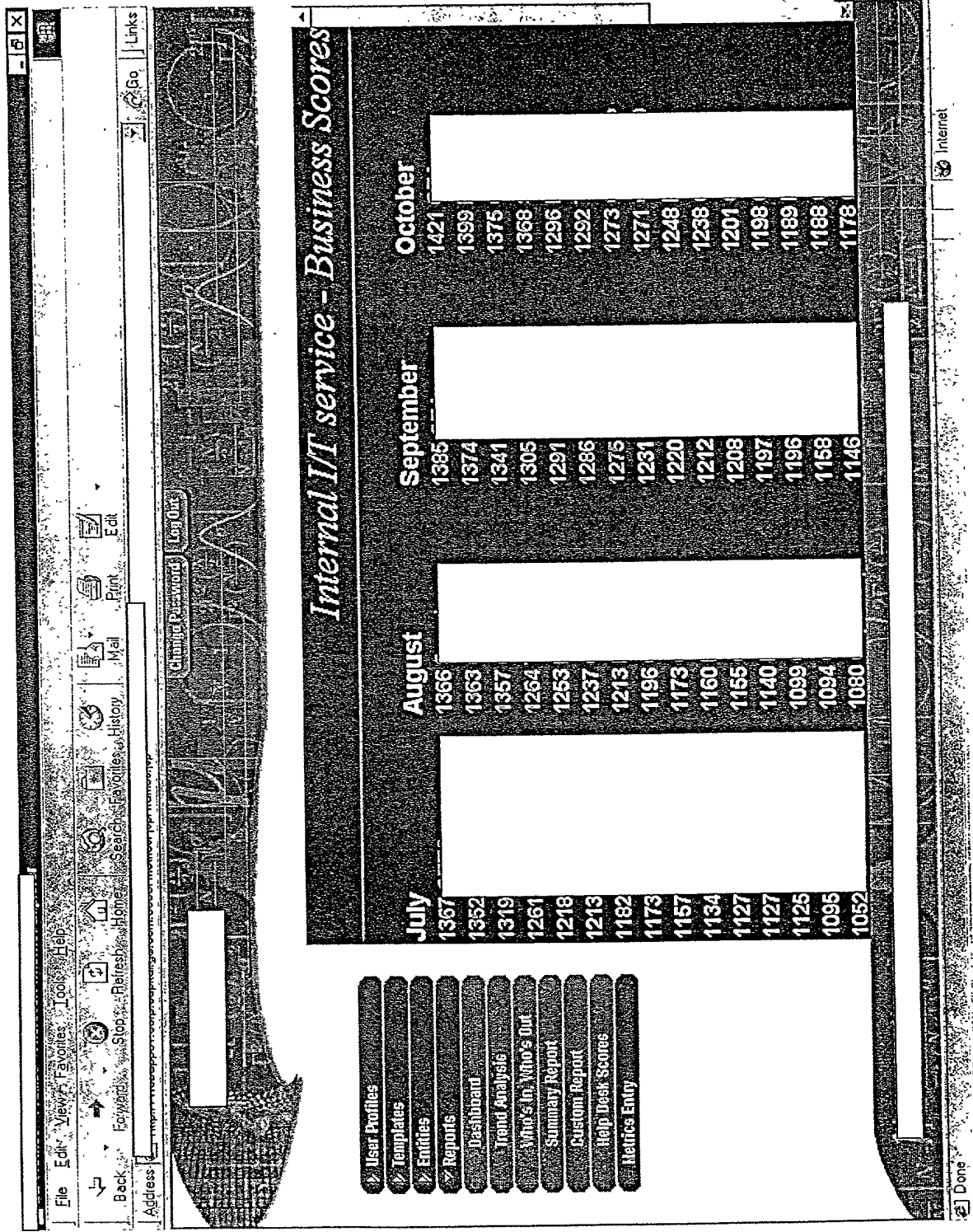
Help Desk Scores

Fig. 49



Help Desk Scores

Fig. 50



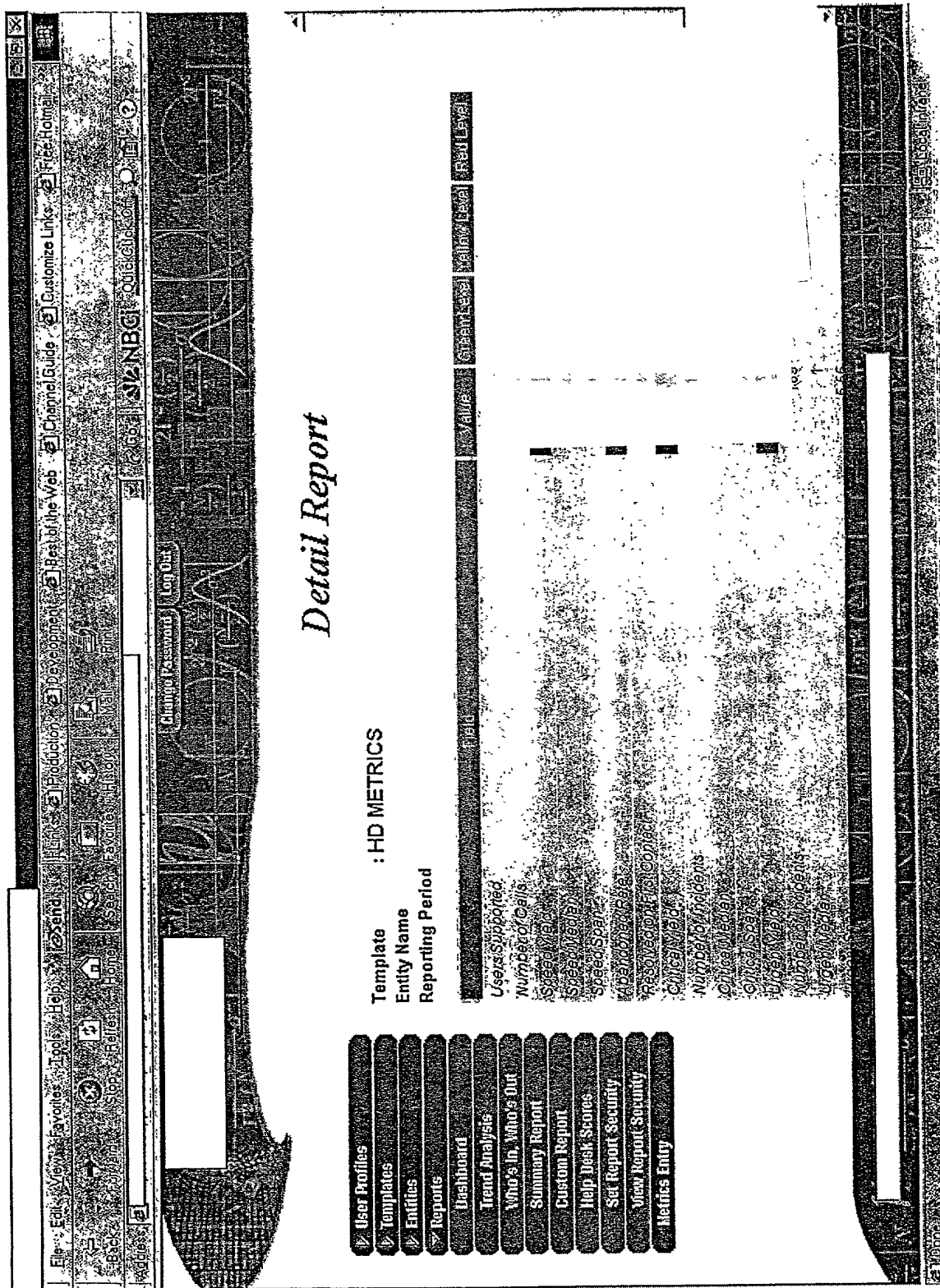
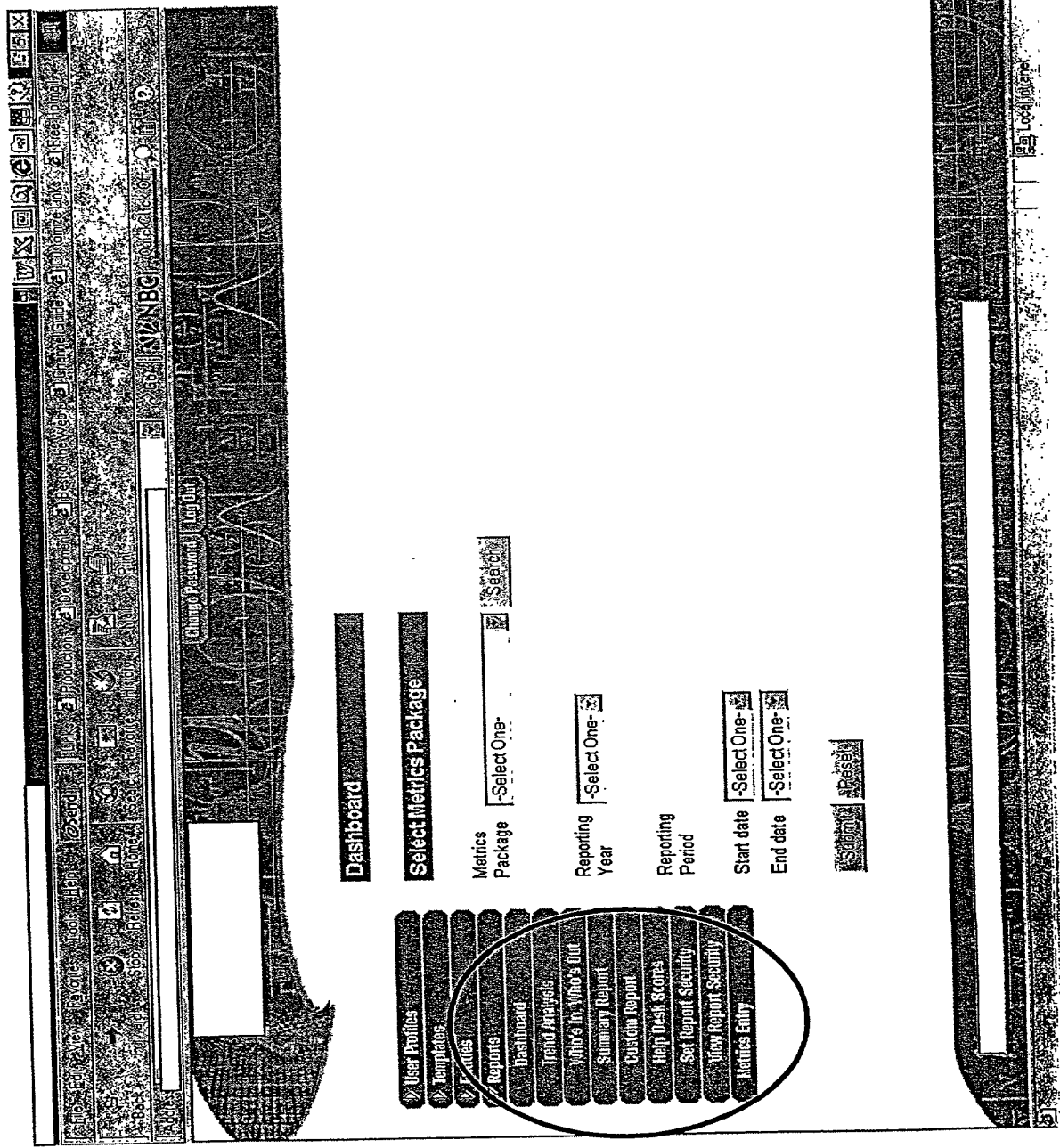




Fig. 53

Viewing Reports



1.1 Define template

This task involves specification of template name, frequency of data collection, contact details of the template owner and definition of metric fields. For each metric field several attributes are specified. This includes field name, field type, field length, rollup method etc.

The screenshot shows a web browser window with the address `http://webapp01.corp.capital.ge.com:8000/metrics/jsp/frames.jsp`. The page has a header with the "ge-metrics" logo and navigation links like "Change Password" and "Log Out". A left sidebar contains a menu with items such as "User Profiles", "Templates", "Create", "Template Definitions", "Validations", "Select Box Details", "Field Categories", "Metric Targets", "Modify", "Copy Template Definition", "Reporting Periods", "Upload Help File", "View Attachments", "Import Remote Database", "Entities", "Reports", and "Metrics Entry".

The main content area is titled "Create Template Definition". It contains a "Template Definition" section with the following fields:

- Template name:
- Frequency:
- First Due Date:
- Contact name:
- Contact phone:
- Contact email:
- Template description:

Below this is the "Field Definition" section, which includes a list of fields to define. The first field is numbered "1." and has the following attributes:

- Display Type:
- Field Type:
- Field Name:
- Field Length:
- Default Value:
- Metric Type:

Small text below the Field Length field reads: "For field type CHAR: # characters" and "For field type NUMBER: # decimals".

FIG 54

1.2 Define validations.

This task involves specifying validations for metric fields defined in the above step. For example, if user of the template should be prevented from entering certain values into a field, that could be specified in this step.

GE Metrics - Frames - Microsoft Internet Explorer

Address: http://webapp01.corp.capital.ge.com:8080/metrics/jsp/frames.jsp

ge-metrics

Change Password Log Out

Add Validations

Template : HD METRICS

Fields : **abandoned_role**

Condition	Message	Proceed	
>=	1	Just be between 0 and 1	Yes
-- Select one --			Yes
-- Select one --			Yes
-- Select one --			Yes
-- Select one --			Yes

Save & Add Save Reset

Footer: © 2000 GE

FIC 55

1.3 Define Field Categories

If there is a need to create calculations based on a bunch of metric fields, this screen allows the user to create field groups and include the fields into them.

GE Metrics - Frames - Microsoft Internet Explorer

Address: http://webapp01.corp.capitalge.com:8080/metrics/sp/frames.jsp

ge-metrics Change Password Log Out

Create Field Category

Enter Category Details

Template : HD METRICS

Category name :

Category Description :

Category Order :

FIG 56

1.4 Define Metric Targets.

User defines the ranges and limits for red, yellow and green targets for each metric on this screen. These target numbers will determine the performance levels of a business which reports that metric. Based on these limits dashboard report will display red / yellow / green traffic lights.

ge-metrics Change Password Log Out

Create/Modify Metric Targets

Template name :
Frequency : Monthly
Report Month : Jan 2000

Field order	Field Name	Weight	Green Level	Yellow Level	Red Level
1	users_supported		Select	Select	Select
2	number_of_calls		Select	Select	Select
4	speed_yield		>= 98	between 94-97	< 94
5	speed_median		Select	Select	Select
6	speed_span		Select	Select	Select
7	abandoned_rate		<= .04	between .04-.06	>= .06
8	resolved_on_first_c		>= 6	between 4-6	< 4
10	critical_yield		>= 98	between 94-98	< 94

FIG. 57

2. Create / Add entities

This function allows the administrator to create new business entities or add already available entities to his / her template. Also, it is possible to copy complete entity structure from another template using one of the options under this function.

2.1 Create Entity

This function allows the user to add new entities to the pool.

The screenshot shows a web browser window titled "GE Metrics - Frames - Microsoft Internet Explorer". The address bar displays "http://webapp01.corp.capital.ge.com:8080/metrics/jsp/frames.jsp". The page header includes the "ge-metrics" logo and links for "Change Password" and "Log Out".

The main content area is titled "Create Entity". On the left, there is a vertical menu with the following options: "User Profiles", "Templates", "Entities", "Create", "Modify", "Add to template", "Modify from template", "Remove from template", "Copy Entity Structure", "Entity Sets", "Reports", and "Metrics Entry".

The "Create Entity" form contains two input fields: "Entity name" with the value "GE Capital Corporation" and "Entity short name" with the value "GECC". Below these fields are two buttons: "Submit" and "Reset".

FIG. 58

2.2 Add Entities to Template

This function allows to attach entities to a template from a pool of entities.

The screenshot shows a web browser window titled "GE Metrics - Frames - Microsoft Internet Explorer". The address bar displays "http://webapp01.corp.capital.ge.com:8080/metrics/jsp/frames.jsp". The page header includes the "ge-metrics" logo and links for "Change Password" and "Log Out".

The main content area is titled "Add Entities to Template". On the left is a vertical menu with the following items: User Profiles, Templates, Entities (selected), Create, Modify, Add to template, Modify from template, Remove from template, Copy Entity Structure, Entity Sets, Reports, and Metrics Entry.

The form fields on the right are:

- Template : HD METRICS
- Entity name :
- Display Name :
- Parent entity :
- Relative Weight :
- For Rollups :

At the bottom of the form are two buttons: "View Entity Hierarchy" and "Submit". A "Reset" button is also visible below the "Submit" button.

FIG. 59

2.3 Copy Entity Structure

This function allows to copy entire entity structure from one template to another. By doing this, user can eliminate the repetitive entry.

The screenshot shows a web browser window titled "GE Metrics - Frames - Microsoft Internet Explorer". The address bar displays "http://webapp01.corp.capital.ge.com:9080/metrics/fsp/frames.jsp". The page features a "ge-metrics" logo and a navigation menu on the left with options: User Profiles, Templates, Entities, Create, Modify, Add to template, Modify from template, Remove from template, Copy Entity Structure (highlighted), Entity Sets, Reports, and Metrics Entry. The main content area is titled "Copy Entity Structure" and includes two dropdown menus labeled "From Template" and "To Template", both currently showing "-- Select One --". There is a checkbox for "Copy Login IDs" which is unchecked. A note states: "Note : Target template should not have any entities in it." At the bottom of the form are two buttons: "View Entity Hierarchy" and "View Login IDs", followed by "Submit" and "Reset" buttons. The status bar at the bottom shows "Done" and "Local intranet".

FIG 66

3. User Profiles

This function allows to create user profiles and grants access to the templates and entities. This functionality is further divided into different screens as follows.

3.1 Create User

This function allows to create new user profiles. There are three types of privileges as follows:

Template Administrator

Who can create template and create other two types of users.

Group Administrator

Who can create sub entities and create normal user.

Normal User

Who can enter data into templates and view reports.

The screenshot shows a web browser window titled "GE Metrics - Frames - Microsoft Internet Explorer". The address bar displays "http://webapp01.corp.capital.ge.com:8000/metrics/jsp/frames.jsp". The page features a navigation menu on the left with options: User Profiles, Create user, Modify user, Grant access to templates, Grant access to entities, Reset Password, Templates, Entities, Reports, and Metrics Entry. The main content area is titled "Create User Profile" and "Enter Profile Details". It includes a note "Fields in BOLD are required" and form fields for Login id, First name, Last name, Telephone, E-mail (with a validation message "Please enter a valid email address"), and User Type (a dropdown menu set to "Select One").

FK. 61

3.2 Grant access to Templates

Using this function administrator can grant access to a user on a template.

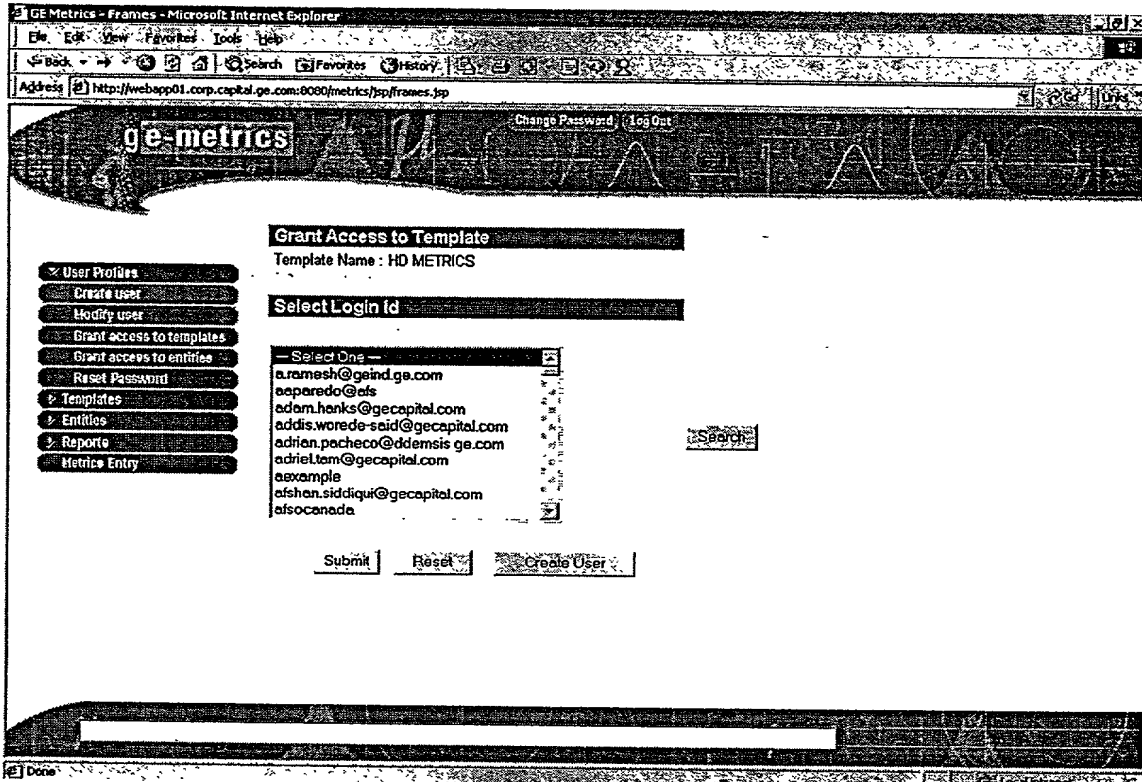


FIG. 62

3.3 Grant Access to Entities

This function allows the administrator to grant access to the entities.

The screenshot displays a web browser window titled "GE Metrics - Frames - Microsoft Internet Explorer". The address bar shows the URL "http://webapp01.corp.capital.ge.com:8080/metrics/jsp/frames.jsp". The page features a "ge-metrics" header with a navigation menu on the left containing links: "User Profiles", "Create user", "Modify user", "Grant access to templates", "Grant access to entities", "Reset Password", "Templates", "Entities", "Reports", and "Metrics Entry". The main content area is titled "Grant Access To Entities" and includes a "Template Name : HD METRICS" label. Below this is a section titled "Select User and Entities" with a "Login id:" dropdown menu (currently showing "Select One") and a "Search:" button. The "Entity Name:" dropdown menu (also showing "Select One") lists three options: "AFS (global business level)", "Aircraft Engines", and "Americom (global business level)". At the bottom of the form are three buttons: "Submit", "Reset", and "Create User".

FIG 63

4. Metrics Entry

This function allows the user to enter data into templates.

GE Metrics - Frames - Microsoft Internet Explorer

Address: http://webapp01.corp.capital.ge.com:8080/metrics/spframes.jsp

ge-metrics

Change Password: Log Out

Metrics Entry

Select Template

Metrics Package: HD METRICS

Reporting Entity: Aircraft Engines

Reporting Period: Qtr-2001

Submit Reset

FIG 64

GE Metrics - Frames - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address http://webapp01.corp.capital.ge.com:8000/metrics/jsplframes.jsp

Change Password Log Out

ge-metrics

Metrics Entry

User Profiles
Create User
Modify user
Grant access to templates
Grant access to entities
Reset Password
Templates
Entities
Reports
Metrics Entry

User ID: admin
Entity: Aircraft Engines
Template: HD METRICS
Reporting Period: Apr-2001

Contact Information for this Template :
Name: David Lee
Phone: 228-2206
Email: david.lee@getcapital.com

Warning: Session will expire in 1 hour. You may save partial input and can come back later.
Note: Please enter all percentages in decimals between 0 and 1, e.g. for 98% enter 0.98

Users Supported:
Number of Calls: 14838
Speed to Answer
Speed Yield: 0.9695
Speed Median: 21

Done Local intranet

FIC 65

5. Reports

This function allows the user to view various canned reports and listings. Some of the most commonly used reports are explained below.

5.1 Who's in Who's out

This report lists all entities in a template for a given period and displays the status of data entry for each entity. It lists the entities in hierarchical manner and carries the child's entry status to the parent and so on. For example if an entity did not enter data for the selected period, it's parent's status is marked as incomplete.

The screenshot shows a web browser window titled "GE Metrics - Frames - Microsoft Internet Explorer". The address bar displays "http://webapp01.corp.capital.ge.com:8080/metrics/jsp/frames.jsp". The page features a "ge-metrics" logo and a navigation menu on the left with options: User Profiles, Templates, Entities, Reports, Dashboard, Trend Analysis, Who's In, Who's Out, Summary Report, Custom Report, Help Desk Score, Set Report Security, View Report Security, and Metrics Entry. The main content area is titled "Metrics Submission status" and shows the following details:

- Template : HD METRICS
- Reporting Period : Apr-2001

Below this information is a table with two columns: "Entity" and "Status". The table is currently empty, with a "Not yet submitted" message at the bottom right. A "Print" button is located to the right of the table header.

FIC 66

5.2 Dashboard

This report lists the entities and their performance with each selected metric in the form of red, yellow and green traffic lights.

DASHBOARD METRICS - Microsoft Internet Explorer

GE Capital March 2001

	Speed Yield	Abandoned Rate	Resolved on First Contact	Critical Yield	Urgent Yield	Normal Yield
Business Entity	94.00%	0.13%	69.43%	100.00%	100.00%	95.53%
Business Entity	97.00%	1.00%	92.00%	88.00%	100.00%	97.00%
Business Entity	99.30%	0.30%	80.70%	100.00%	100.00%	96.70%
Business Entity	100.00%	0.65%	70.09%	100.00%	100.00%	96.67%
Business Entity	99.85%	0.00%	69.30%	96.59%	97.65%	98.44%
Business Entity	98.60%	1.00%	69.20%	99.50%	96.00%	92.00%
Business Entity	87.50%	2.10%	79.20%	100.00%	84.30%	95.60%
Business Entity	99.00%	0.60%	64.00%	98.70%	99.00%	93.00%
Business Entity	96.00%	0.45%	64.37%	100.00%	94.44%	97.53%
Business Entity	81.00%	6.00%	81.00%	100.00%	95.00%	87.00%

FIG. 67